Welcome

In the first lesson we discussed the basics of Workforce Administration and looked at the pages and fields used to set up and maintain employee information. You should now have an understanding of the relationship between Personal Information, Position Management and employee Job Data.

In Lesson 2 we will learn about entering transactions impacting a person's employment history such as personal information, hiring, promoting, and transferring employees.

Lesson Objectives

After completing this lesson, you will be able to:

- Add/Modify a person
- Hire/Rehire an employee
- Promote/Demote/Transfer an employee
- Place an employee on an Acting Assignment
- Enter an Employee Review
- Change employee pay

Lesson Topics

In this lesson you will learn about the following topics.

Topic 1: Personal Information

Topic 2: Appoint Employees to Positions

Topic 3: Promote, Demote, & Transfer Employees

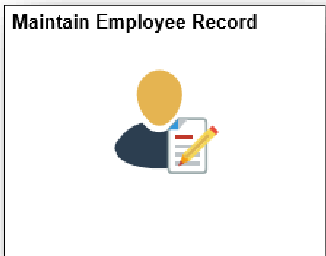
Topic 4: Acting Assignment

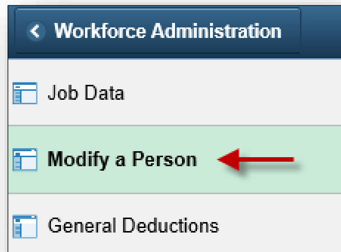
Topic 5: Employee Reviews

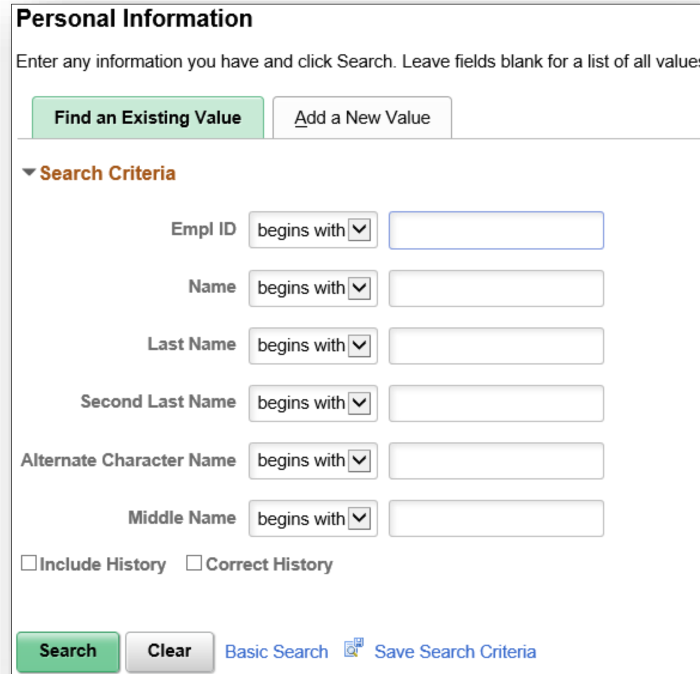
Topic 6: Pay Rate Changes

Personal Information

Search for the Employee







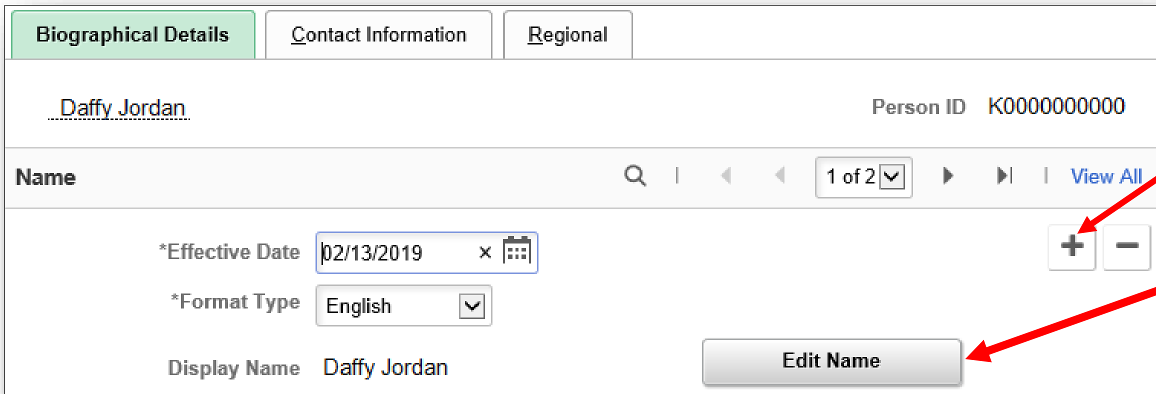
Here you can enter partial names if you are unsure how to spell the employee's name or don't know the Employee ID Number.

For example, if you only know a portion of the first or last name type in as much of the first name as you know how to spell and then enter the last name.

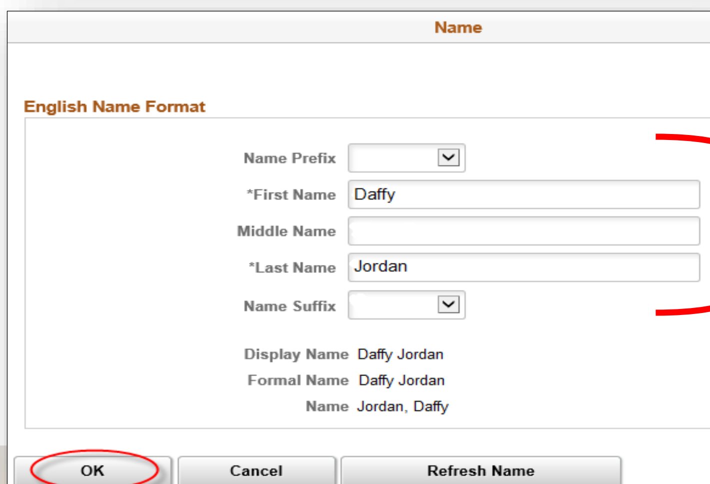
You can also use the wildcard % option. For example, Smit% in the Last Name field will bring up a list of all employees whose last name begins with Smit – such as Smith, Smithers, Smithson and so on.

Personal Information

Modify a Person – Name Change



Click on + to add a row and change the effective date if needed. Click on Edit Name button to open the Edit Name box.

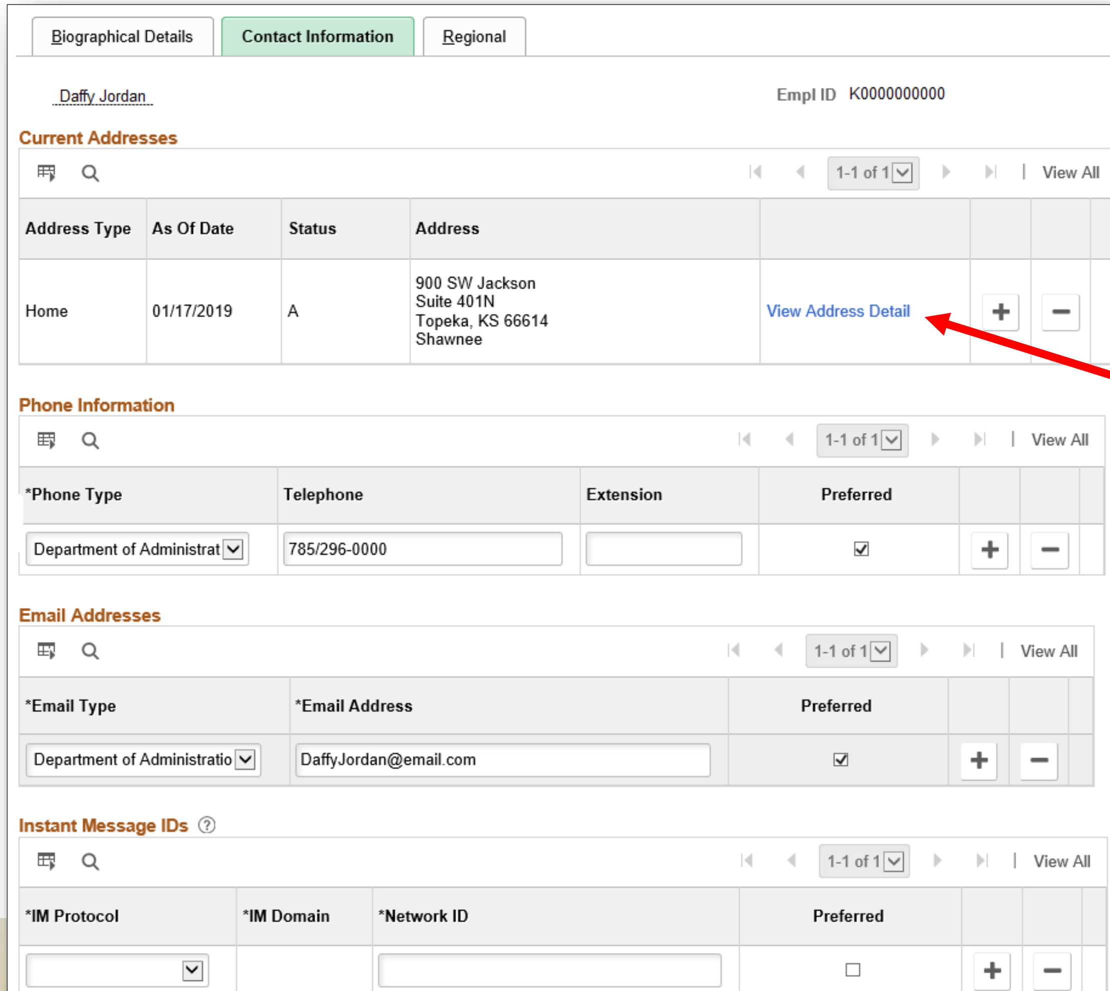


Change the name as appropriate and click the OK button to return to the Biographical Details page.

Click on the Save button on the Biographical Details page to save your changes.

Personal Information

Modify a Person – Address Change



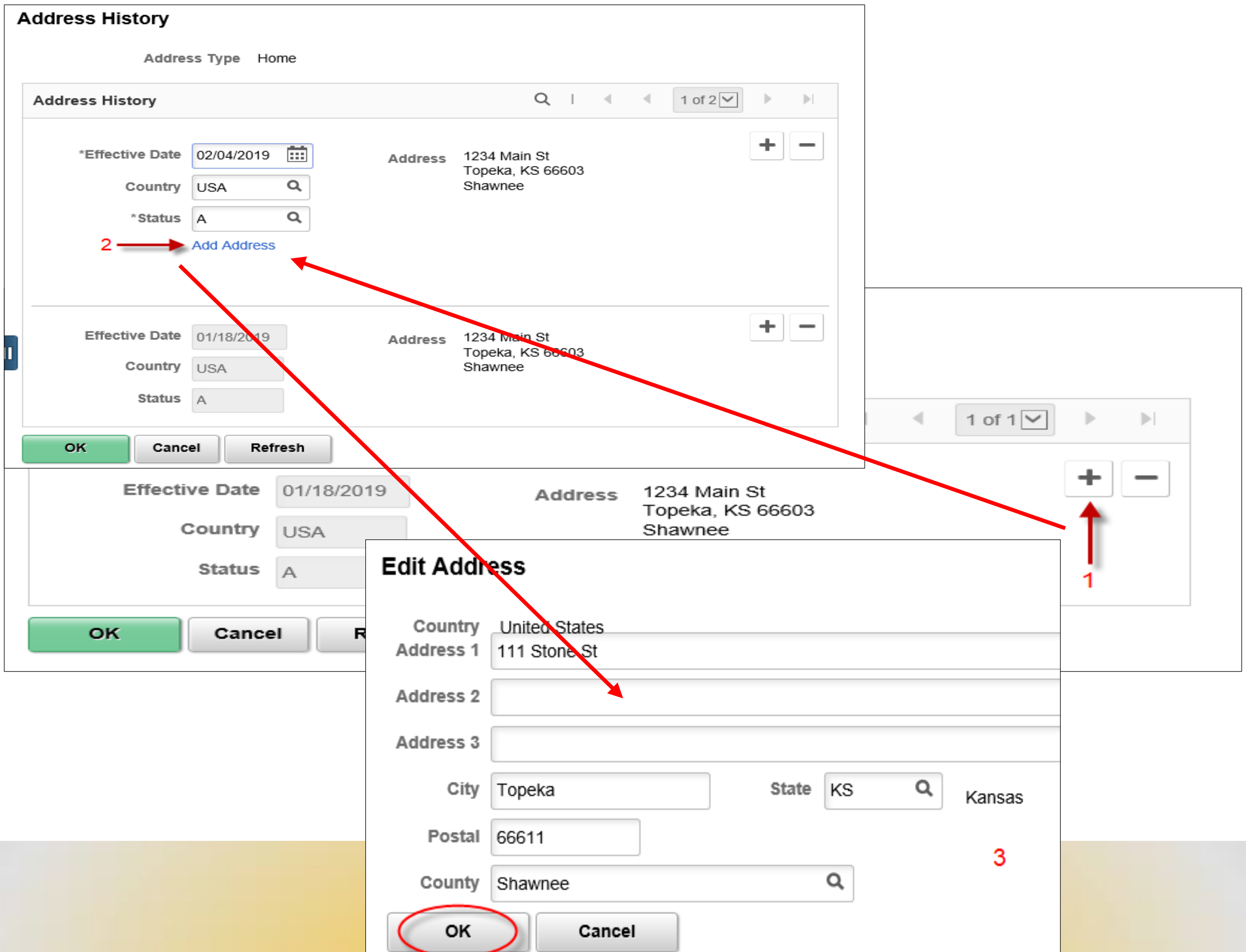
<u>Do not</u> click the + button in Current Addresses to change the address. The + button here is used to add another type of address, such as mailing.

To change an employee's Home address, click on this link to open a new area to change the address.

Go to the next page to see how this is done.

Personal Information

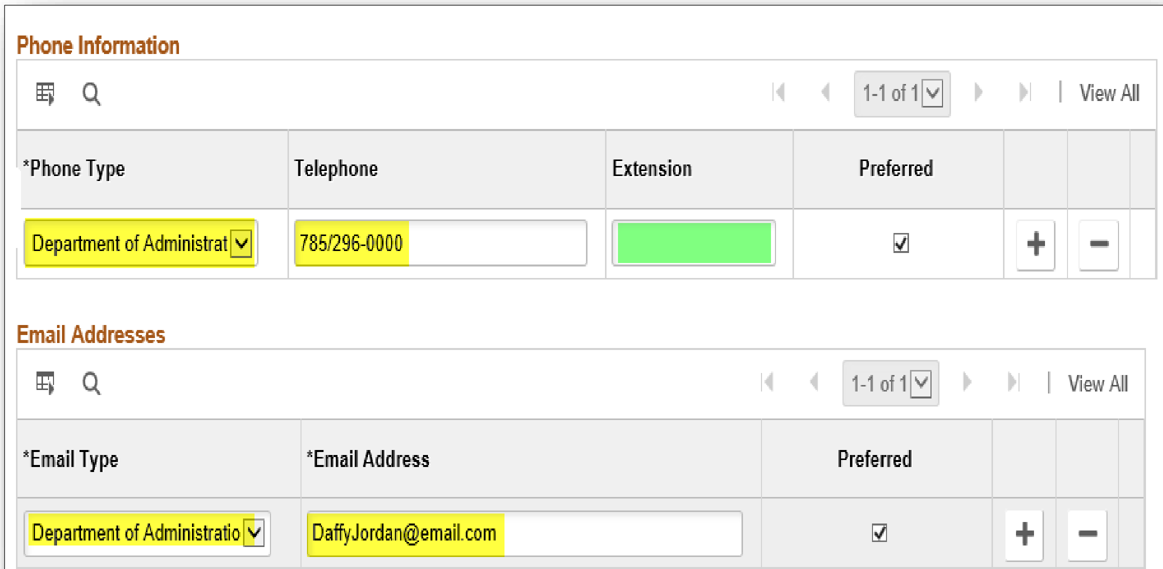
Modify a Person – Address Change cont.



1. Click the + to open Address History.
2. Click Add Address link to open Edit Address.
3. Change the address and click OK to return to Personal Information.
4. Save

Personal Information

Modify a Person – Telephone/Email Change



Contact Information is also the page to enter or change an employee's phone number and e-mail address.

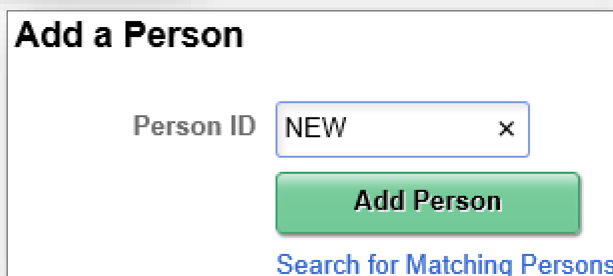
If you want the employee's phone number to appear in the online communication directory, be sure to select your agency in the Phone Type field. Also select your agency as the E-mail Type for the employee's email.

Do not enter any formatting for the telephone number. SHARP will auto-format the field when tabbing out. Enter the extension number in the Extension field.

For example, enter 7852960000 and when you tab out of the field it formats to 785/296-0000. If the formatting is manually entered it won't be identified for the online communication directory.

Appoint Employees to Positions

Add a Person

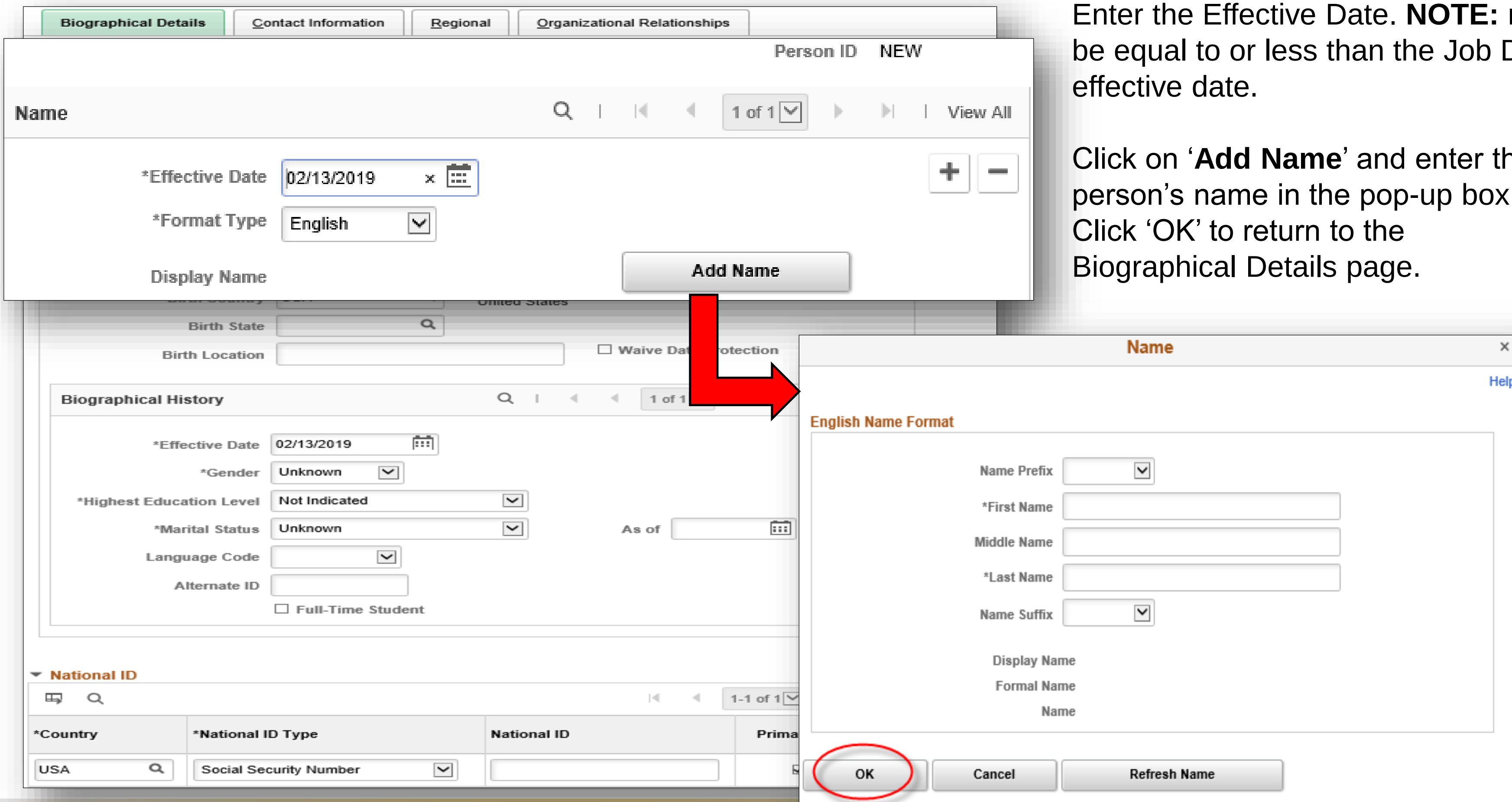


If the employee has never worked for the state before and has no Employee ID Number and the Recruiting process is not being used to appoint a person to a position, you must ‘Add’ the person to SHARP before entering the hire in Job Data.

Click on the ‘**Add a Person**’ link and then click on the ‘**Add Person**’ button to move to Personal Information pages where you will enter the employee’s name, birth date, and other information.

Appoint Employees to Positions

Add a Person - Name

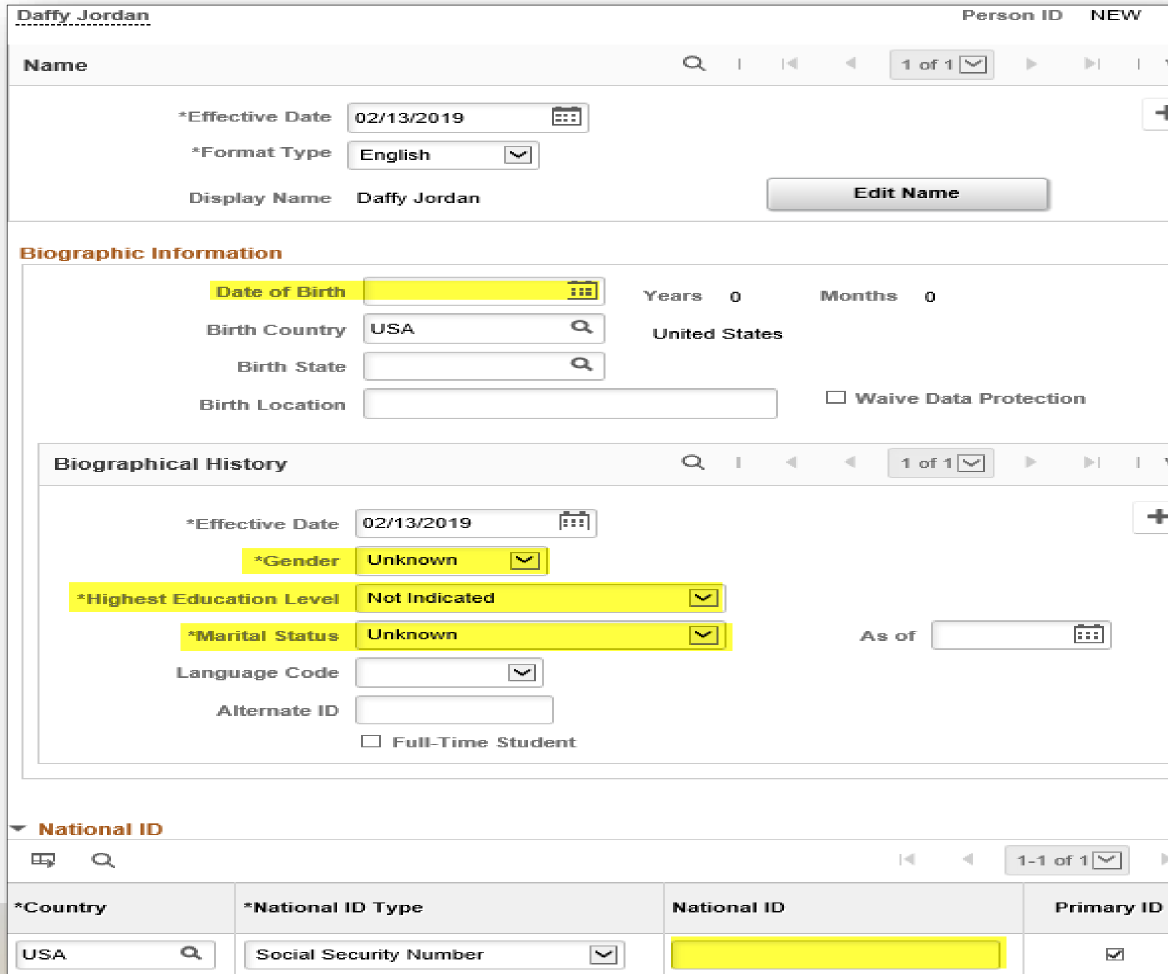


Enter the Effective Date. **NOTE:** must be equal to or less than the Job Data effective date.

Click on '**Add Name**' and enter the person's name in the pop-up box. Click 'OK' to return to the Biographical Details page.

Appoint Employees to Positions

Add a Person – Biographic Information

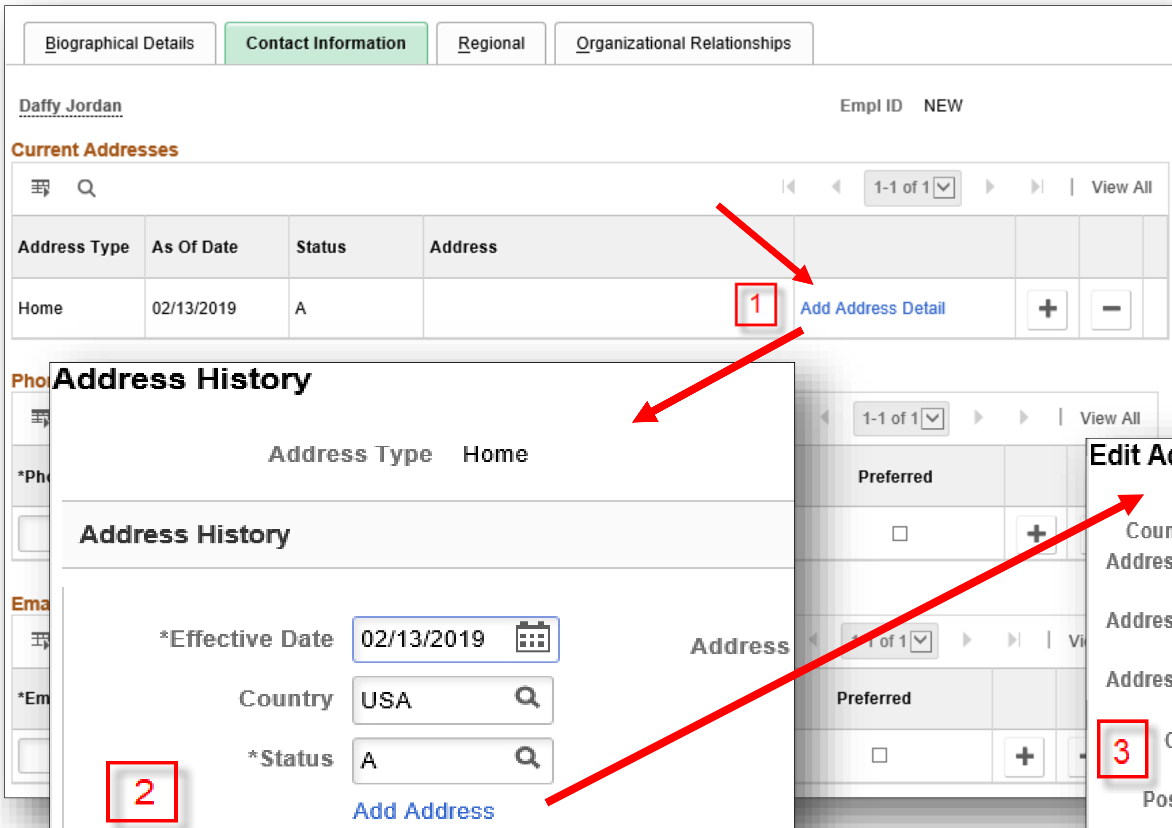


Enter the remaining information (Date of Birth, Gender, Highest Education Level, Marital Status, and Social Security Number).

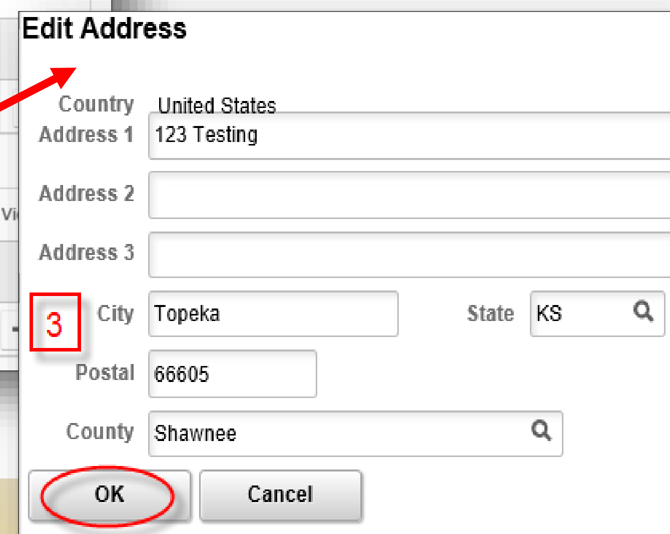
Click on the Contact Information page tab to continue.

❑ Appoint Employees to Positions

❑ Add a Person - Address

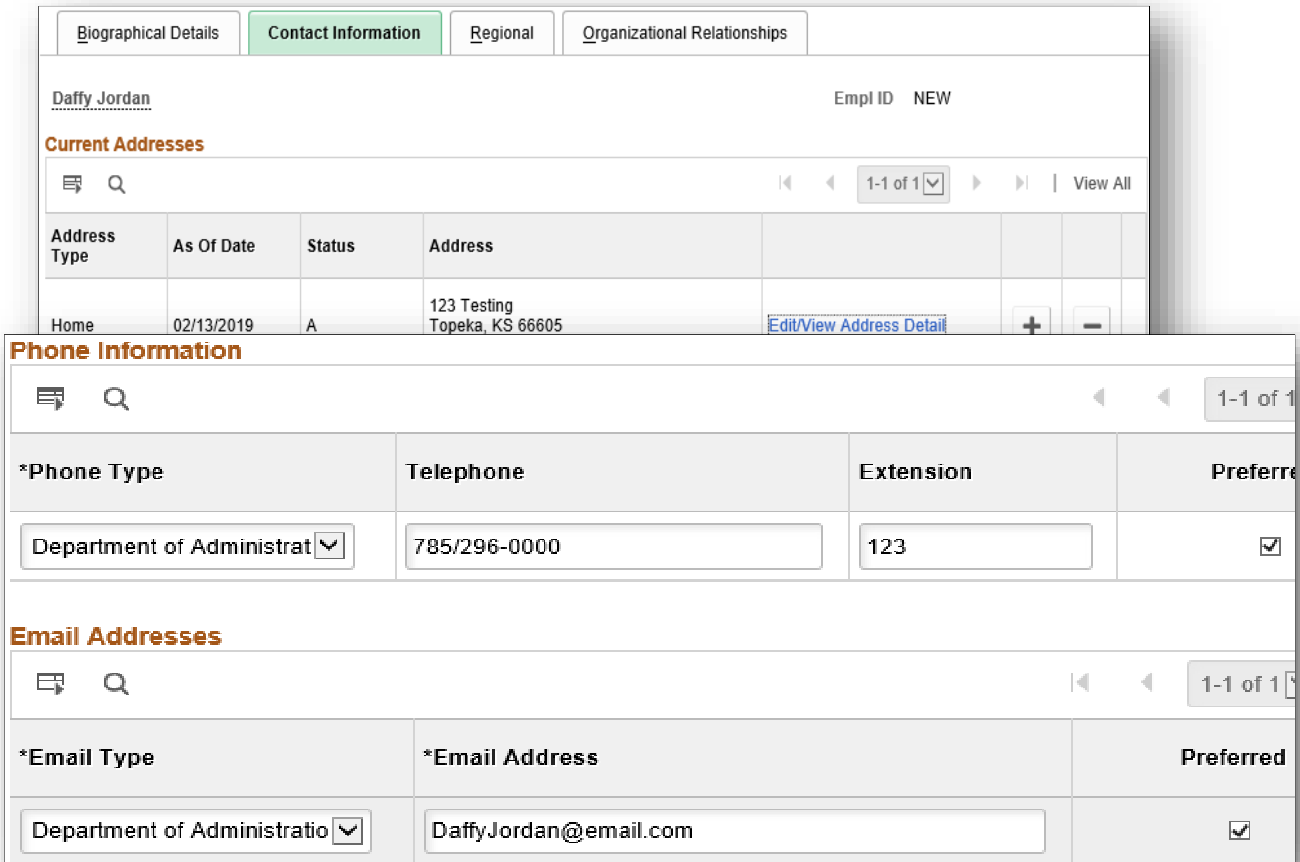


1. Enter the new employee's home address by clicking on 'Add Address Detail.' This opens the 'Address History' box.
2. Click on the 'Add Address' link to open the 'Edit Address' box.
3. Enter the address information and click 'OK' until you return to the Contact Information page.



Appoint Employees to Positions

Add a Person – Phone and Email



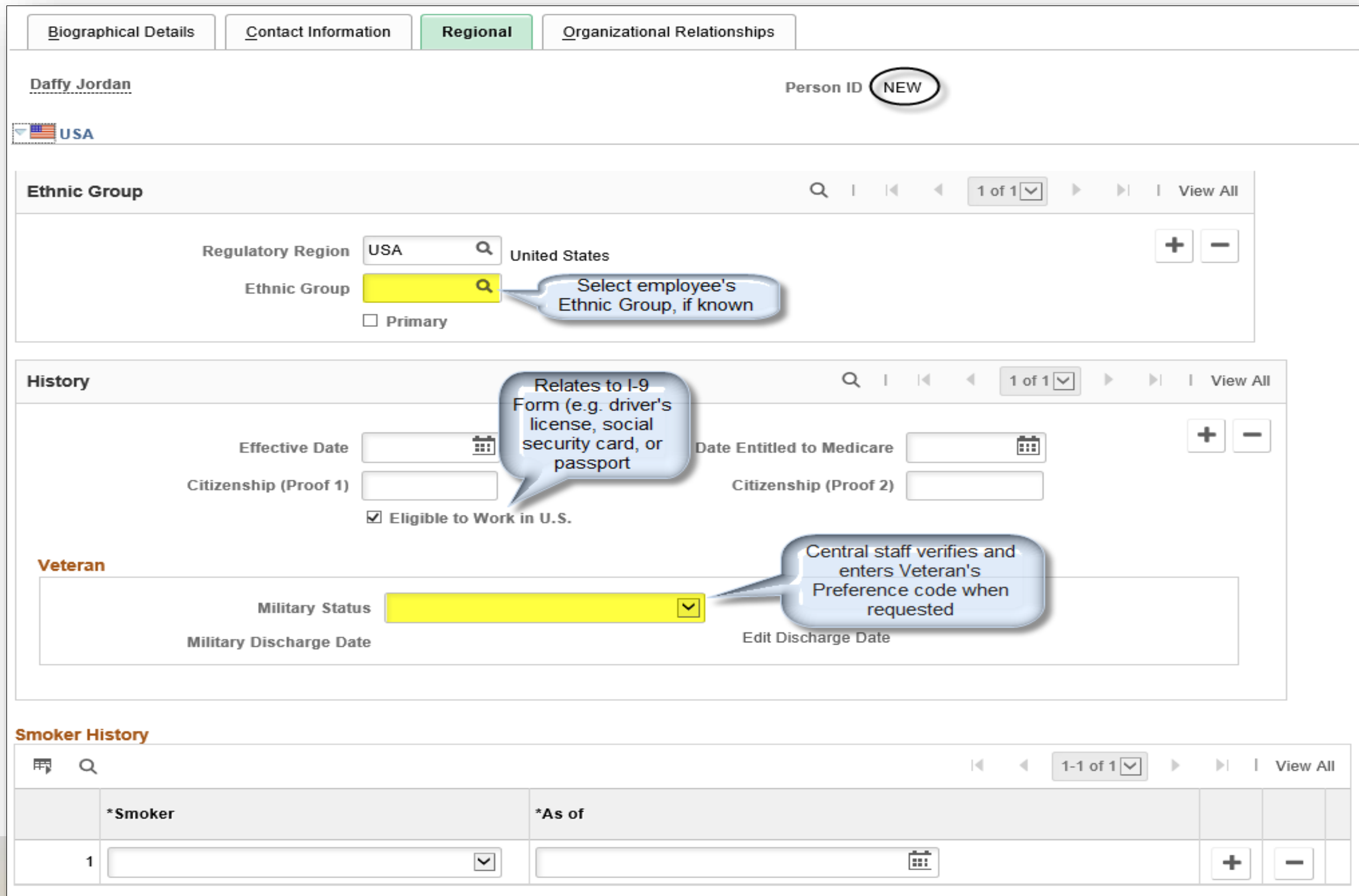
Select your agency from the drop-down options for both the **Phone Type** and **E-mail Type**. The types enable the employee's information to appear in the online Communication Directory.

When entering the phone number, do not add formatting. SHARP will auto-format the number so that it will populate to the online directory. For example, Daffy's phone number was entered as 7852960000. SHARP auto-formatted the number after tabbing out of the field. Enter the extension in the Extension field.

Enter the employee's e-mail address along with your agency as the Email Type.

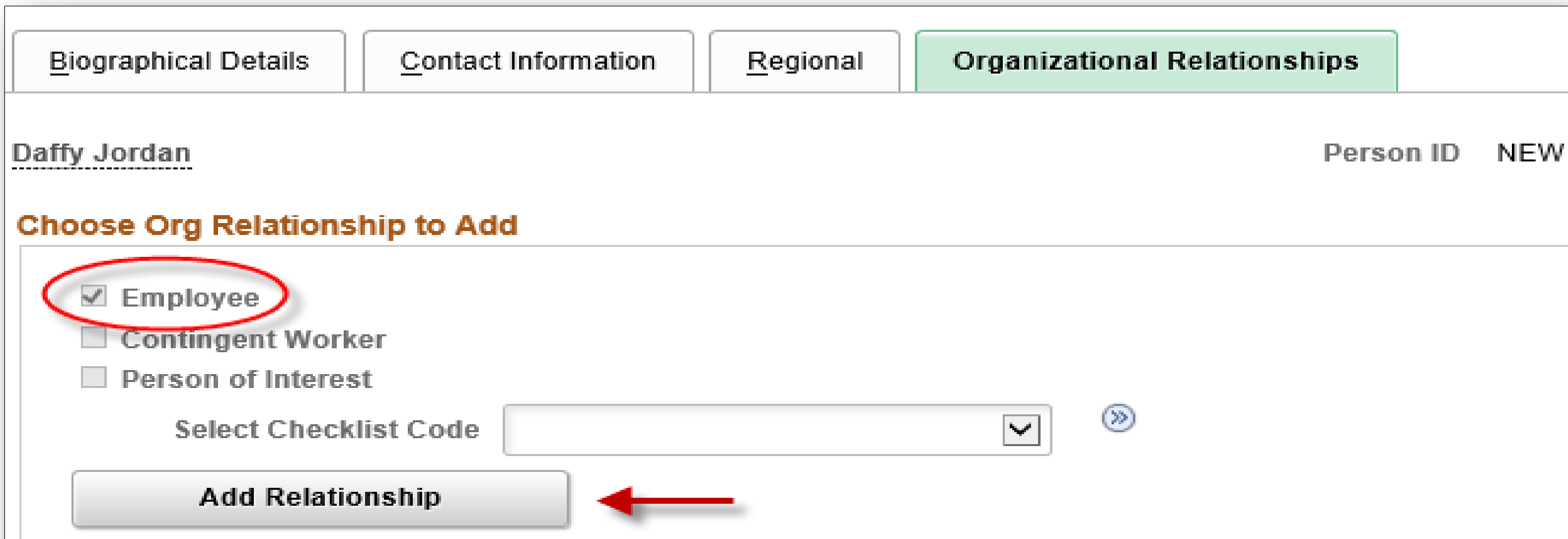
Appoint Employees to Positions

Add a Person – Ethnic Group



Remember - click on the looking glass to see all of the options.

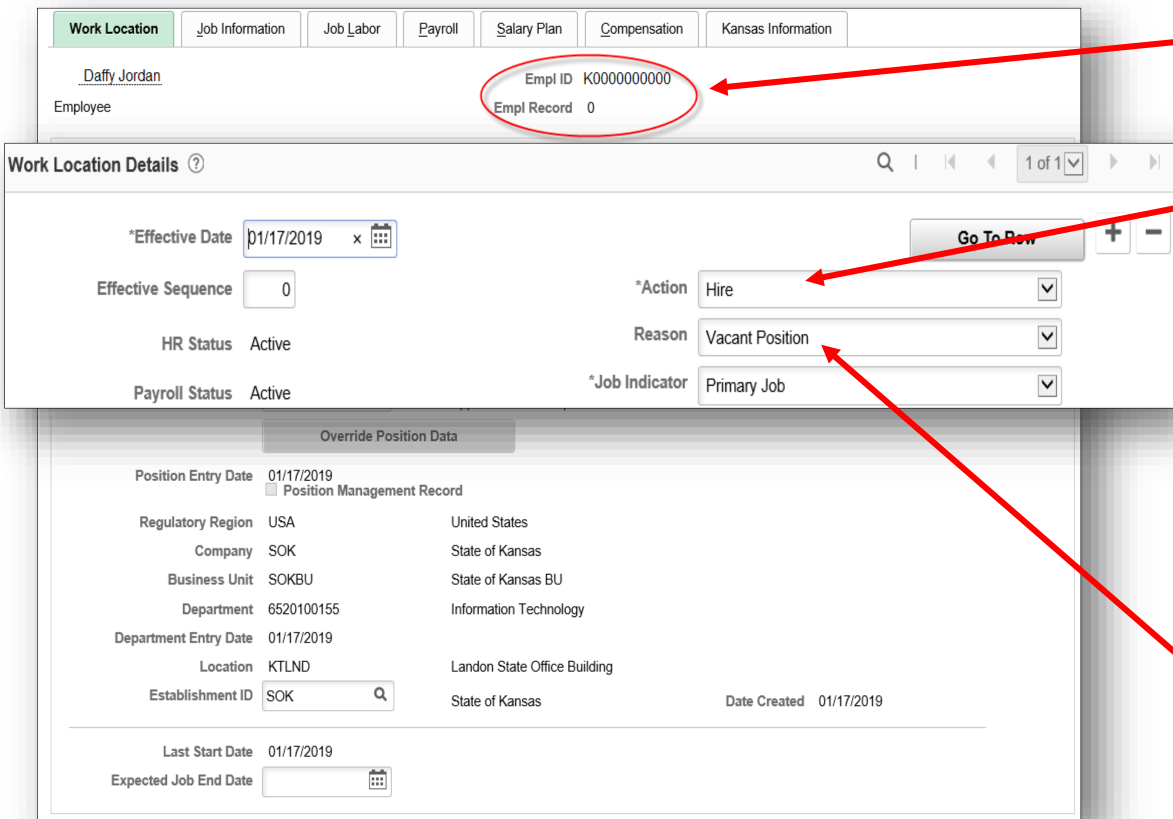
- **Appoint Employees to Positions**
  - **Add a Person – Add Relationship**



Notice that Daffy’s Employee ID hasn’t been created yet. The Employee ID will be created when you click on the ‘Add Relationship’ button to move to the Job Data pages to appoint the employee to their new position.

Appoint Employees to Positions

Hire a New Employee – Work Location



After clicking 'Add the Relationship' SHARP takes you right into Job Data and assigns an Employee ID. The person's name, ID and Employee Record # display. The action of 'Hire' defaults.

The effective date of the Hire must be the same or greater than the effective date used to add the person.

Select the appropriate Reason from the drop down list. The reason used is based on several factors. Be sure to check the SHARP Action/Reason Guide for the appropriate Reason for this Hire Action. The Reasons are also shown on the next page.

Hire a New Employee - Reasons

The following reasons for a Hire action are taken from the SHARP Action Reason Guide:

Vacant Position: Hire a person who is new to state service into a vacant position

Hire Higher Step – Exceptional Qualifications: Hire an employee with exceptional qualifications at a higher step if cannot employ the candidate at minimum step. Exceptional qualifications are based on education, training, experience, skills, and other qualifications directly related to the position. K.A.R. 1-5-8(b)(1)

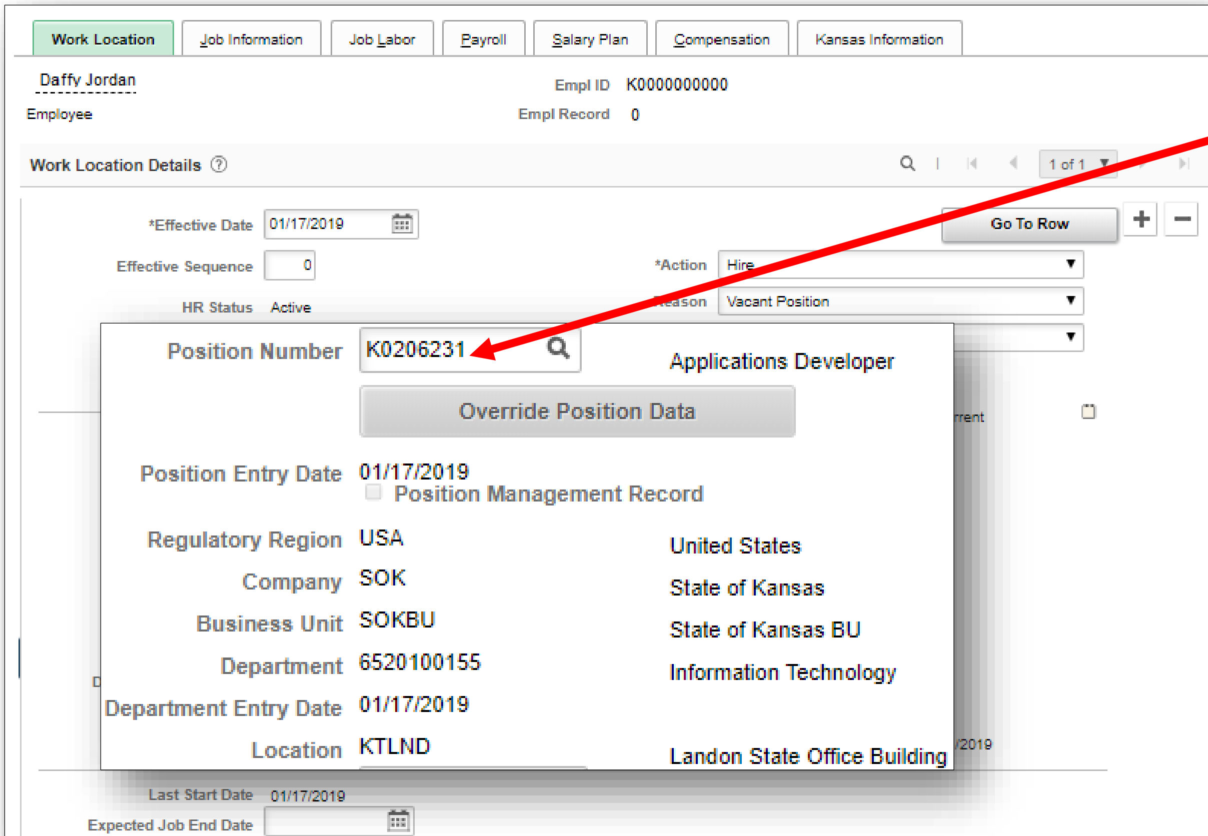
Higher Step (KAR 1-5-8(b)(2)): Hire an employee at a higher step due to a lack of candidates for a class of positions as authorized by the Director of Personnel Services. K.A.R. 1-5-8(b)(2)

Concurrent (Multiple) Position: Hire a current regular part-time employee into another part-time position. Percentage of time worked on all positions shall not exceed 100% except for a classified exempt employees holding one or more unclassified teaching or research positions in a state educational institution with appointing authority approval. K.A.R. 1-5-22

Conversion: Central use only. Used for changes associated with PeopleSoft upgrades. Agencies should not use this reason.

Appoint Employees to Positions

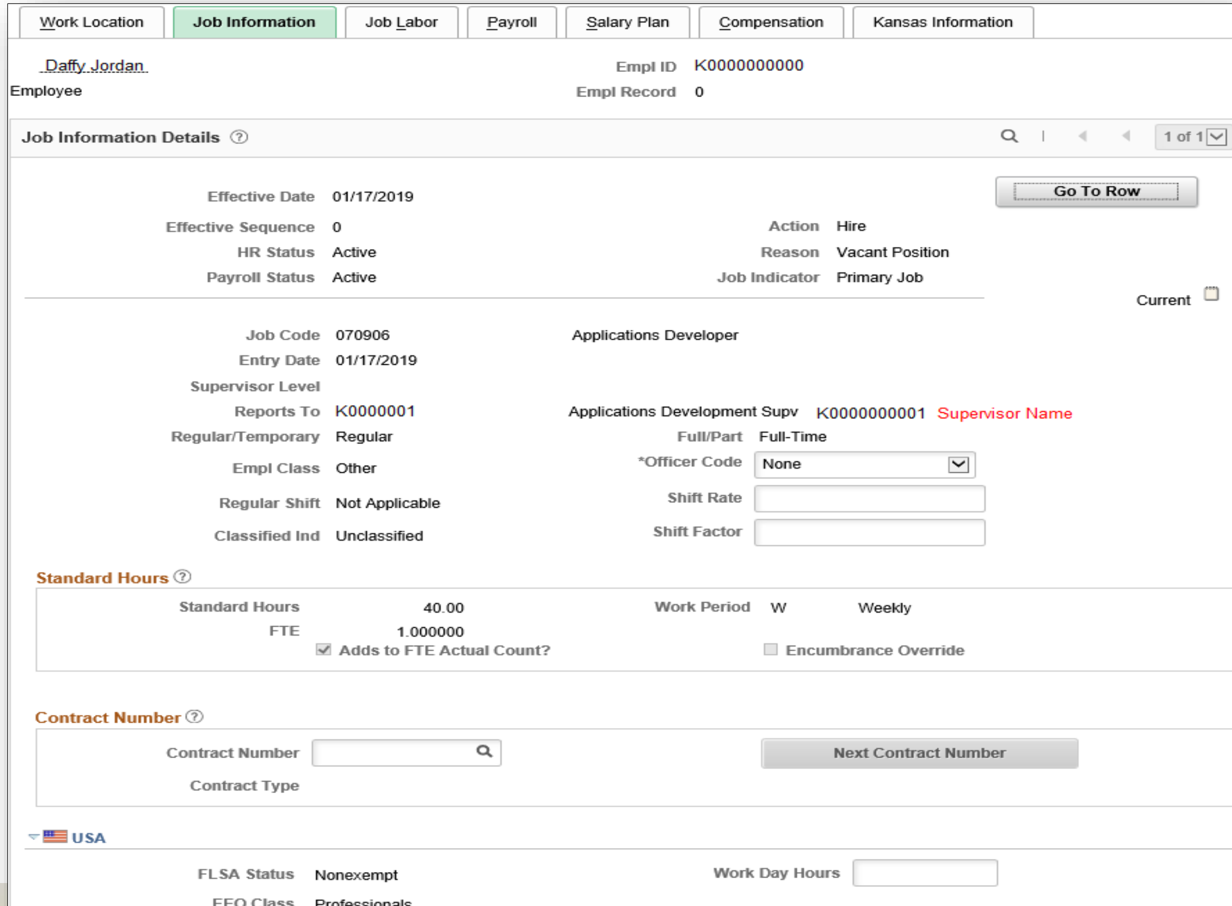
Hire a New Employee – Work Location



Enter position number. Department and Location data will default in from Position Data.

Appoint Employees to Positions

Hire a New Employee – Job Information

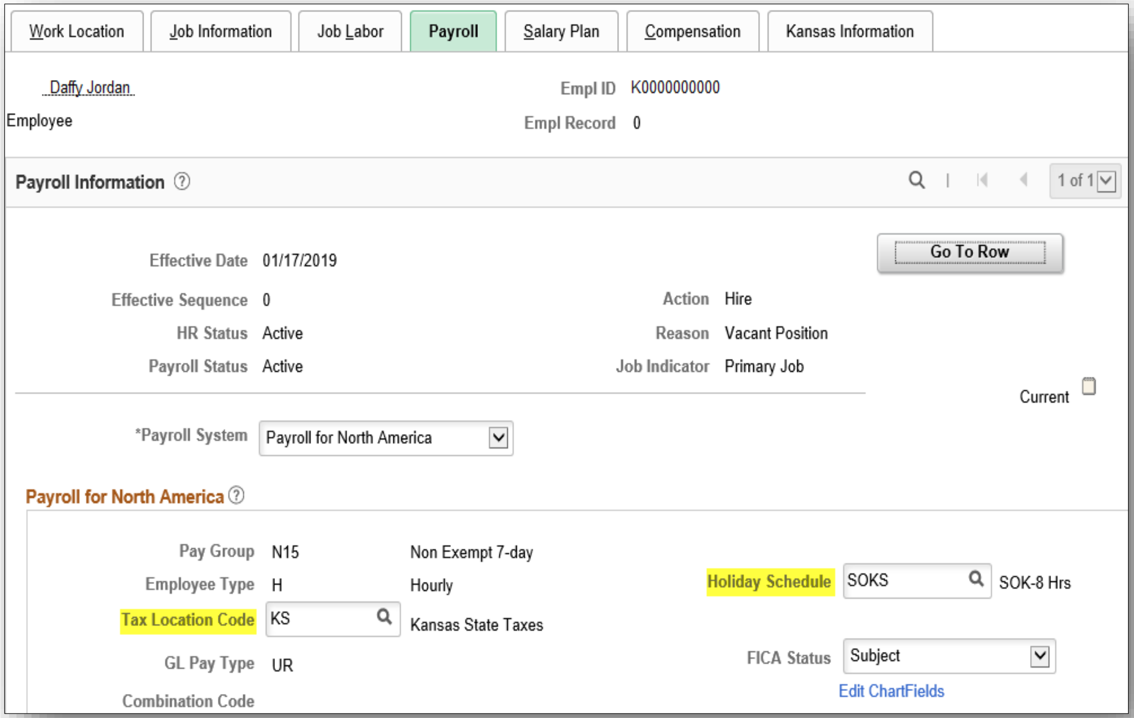


Fields on the Job Information page default from Position Data.

Be sure to review everything to make sure the position is set up correctly.

Appoint Employees to Positions

Hire a New Employee - Payroll



More information about FICA – Social Security and Medicare Status is on the next page.

We don't use the Job Labor page, so let's skip to Payroll.

Select the **Tax Location Code** (state where the position is located) and **Holiday Schedule**.

Most employees are subject to **FICA**, but the State's Section 218 Agreement with the Social Security Administration exempts some employees from Social Security (OASDI) and Medicare.

Agencies are responsible for ensuring that employees are exempted as appropriate. If the employee is exempt only from Social Security, select "Medicare only' from the drop down list.

Please see Accounts and Reports Information Circular No. 05-P-025 for more information and a partial list of employees who are exempted. Find it here.

Appoint Employees to Positions

Hire a New Employee - FICA

FICA – Social Security and Medicare Status

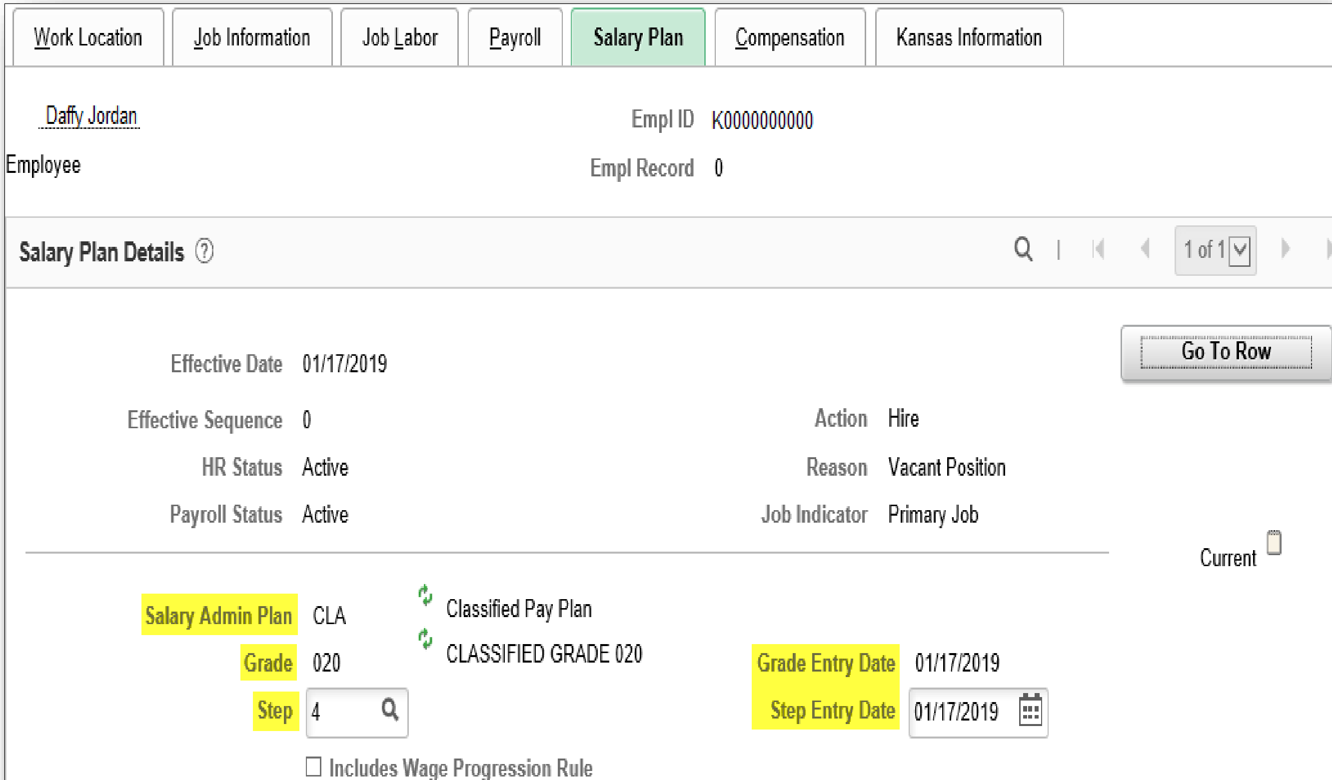
The 'FICA Status' field in Job Data is required to maintain federal tax information that SHARP uses to calculate federal taxes. The options are Subject, Exempt, and Medicare Only.

All employees are subject to FICA and Medicare unless specifically exempted from one or both. The following employees are exempted from FICA and/or Medicare:

Students: Exempt - Employed by educational institution while attending classes full-time
Kansas Police and Firemen's Retirement: (1) Exempt - Employees hired prior to April 1, 1986. (2) Medicare Only - Employees hired on or after April 1, 1986.
Members of the Federal Retirement System: Medicare Only - Employees hired prior to January 1, 1984
F-1 Visa: Exempt
J-1 Visa: Exempt
Foster Grandparent and Senior Companion: Exempt
Emergency Duty – National Guard – Agency 034: Exempt
Resident Worker: Exempt
Employees Receiving Disability Insurance Benefits: Exempt - Limited to 'such employee is entitled to disability insurance benefits under section 223(a) [42 USCS, 423(a)] and such entitlement commenced prior to the calendar year in which such payment is made, and if such employee did not perform services for such employer during the period for which such payment is made…' See Social Security Action, Section 209(a)(13).
Wages after death: Exempt – If payment will be issued in the year following death

Appoint Employees to Positions

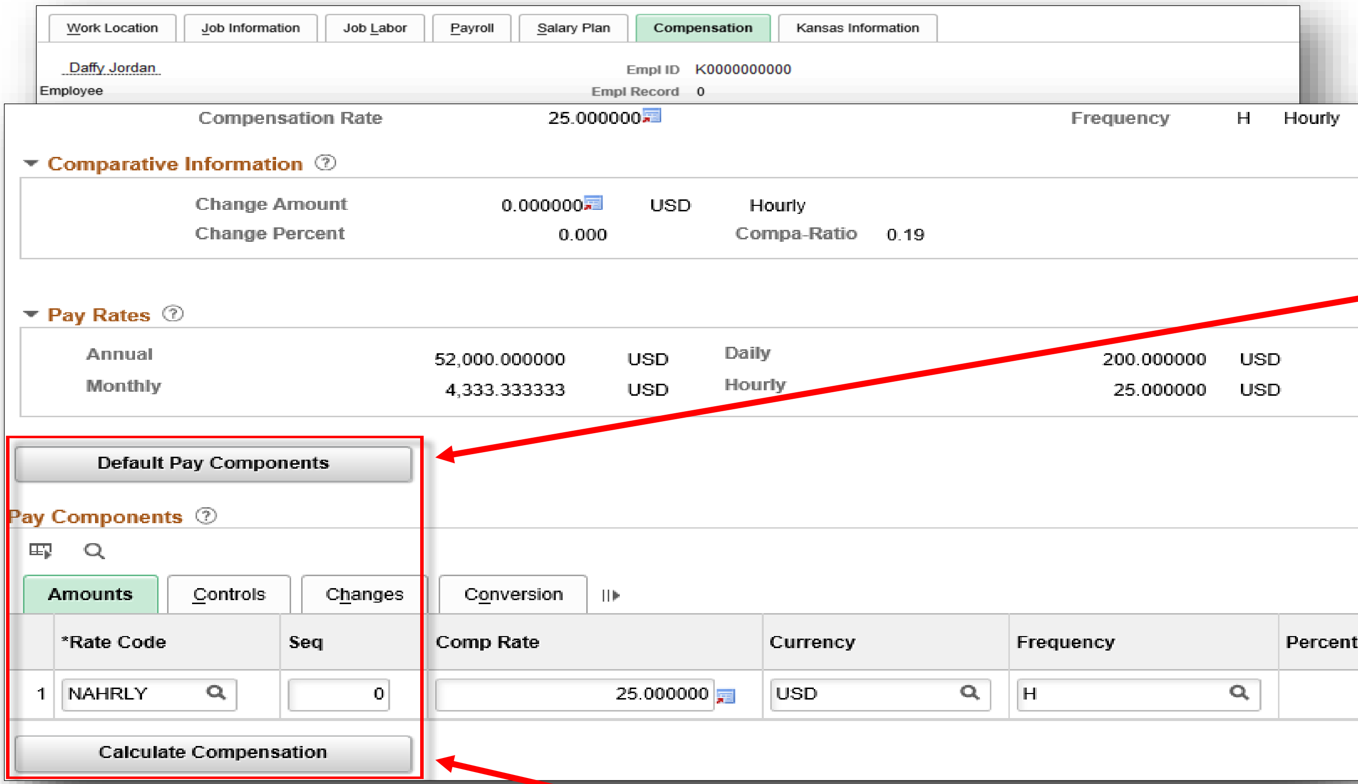
Hire a New Employee – Salary Plan



The **Salary Administration Plan and Grade** corresponding to the position's job code defaults in on the **Salary Plan page**. For classified employees, the **Step** defaults to 4. You can change the step if you are hiring the person above step 4 – be sure that you selected the correct Reason on the Work Location page if you appoint the employee at a higher step. The **Grade Entry Date** and **Step Entry Date** defaults as the date the employee first entered the Grade or Step.

Appoint Employees to Positions

Hire a New Employee - Compensation



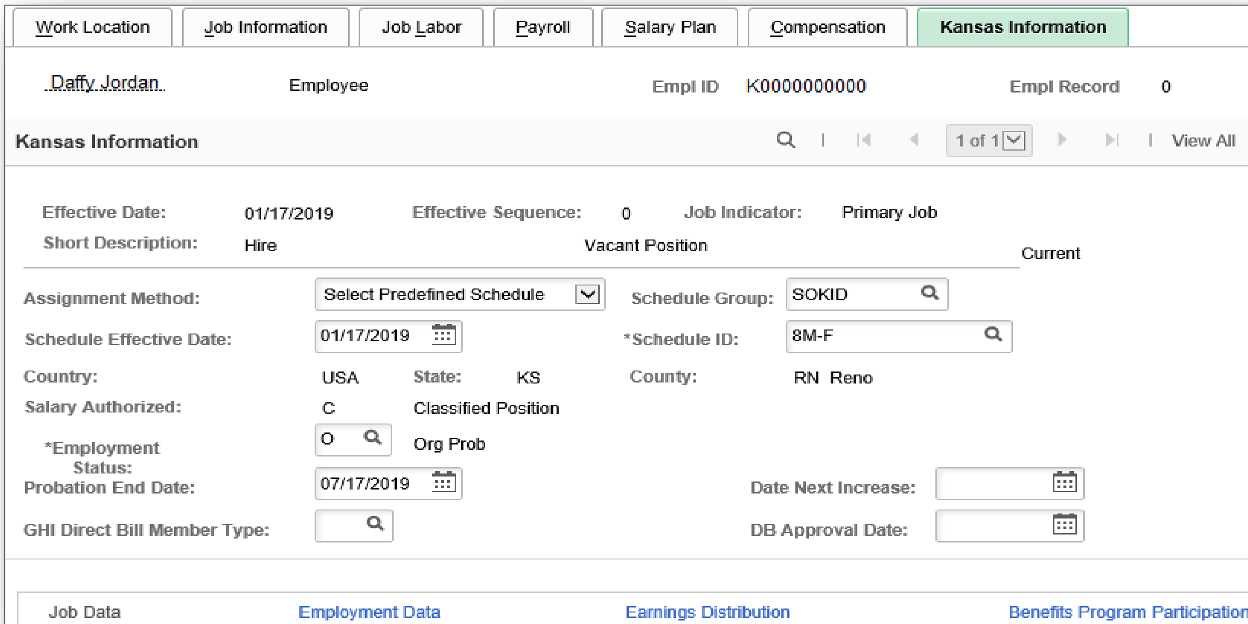
All of the compensation fields on the **Compensation** page are blank until you click on the ‘Default Pay Components’ button.

Click on the ‘Default Pay Components’ button to fill in the **Compensation Rate and pay rate fields** based on the Step entered on the Salary Plan page for classified employees and others whose positions are tied to a pay matrix (salary plans CLA, WS, and JDG).

For employees whose pay is not tied to a pay matrix (such as UNC for unclassified) **manually enter the hourly rate** in the Comp Rate field and click the **‘Calculate Compensation’** button. The Rate Code is always ‘NAHRLY’.

Appoint Employees to Positions

Hire a New Employee – Kansas Information



Assignment Method: Default "Select Predefined Schedule"
Schedule Group: Default "SOKID"
Schedule Effective Date: Same as Hire date
Schedule ID: Enter the employee's 'Work Schedule' code
Employment Status: 'Original Probation' for newly hired employees to classified regular positions are subject to a 6 month probationary period (K.A.R. 1-7-3). See below.
Probation End Date: Defaults as 6 months after the hire date

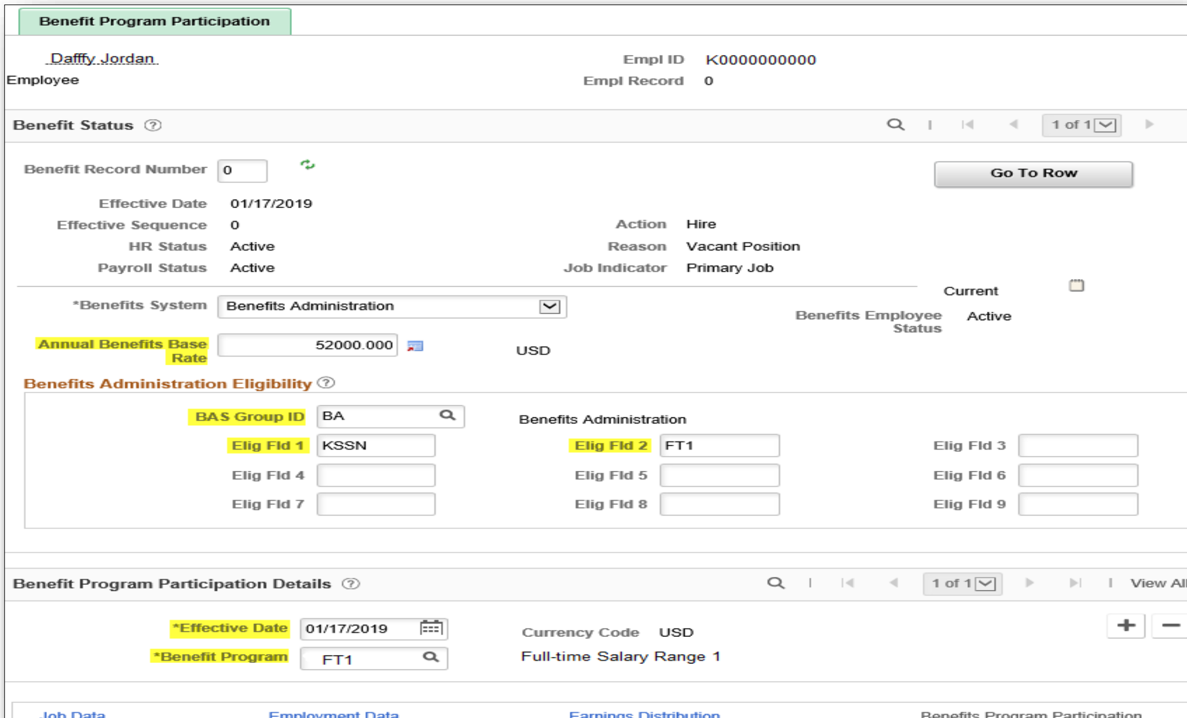
Click on the **Benefit Program Participation** link.

More Information on the Original Probationary Period

A classified employee is to receive a performance review prior to the end of the probationary period. If the overall rating is unsatisfactory the employee is not granted Permanent status. An employee on Original Probation may be dismissed at any time during the probationary period. The probationary period may be extended for up to 6 more months if the action to extend probation is taken before the end of the original 6 month probationary period. Also, a probationary period of not more than 12 months may be established by the appointing authority if specific training or certification requirements cannot be completed within 6 months.

Appoint Employees to Positions

Hire a New Employee – Benefit Program



Benefit Program Participation Effective Date: The effective date of the Hire.
Benefit Program: Same as the code used in the Elig Fld 2 above.

Annual Benefits Base Rate: Enter the amount, which is usually the same as the employee's Annual Rate. This field is used to calculate the employee's imputed income and is described in more detail on the next page.

BAS Group ID: is always BA

Elig Fld 1: Enter a 4-letter code related to employee's home address (2-letter state abbreviation, 2-letter county abbreviation). For example, KSSN is Kansas, Shawnee County.

Elig Fld 2: Enter the employee's benefit administration code.
GEN – not benefits eligible
FT1 – FTE above .90
PT1 – FTE is below .89

Hire a New Employee – ABBR Explained

Annual Benefits Base Rate (ABBR)/Imputed Income

What is Imputed Income? Benefits eligible state employees have group term life insurance coverage which provides an insured death benefit of 150% of the employee's annual rate of compensation. The State of Kansas, as the employer, pays the entire cost of coverage.

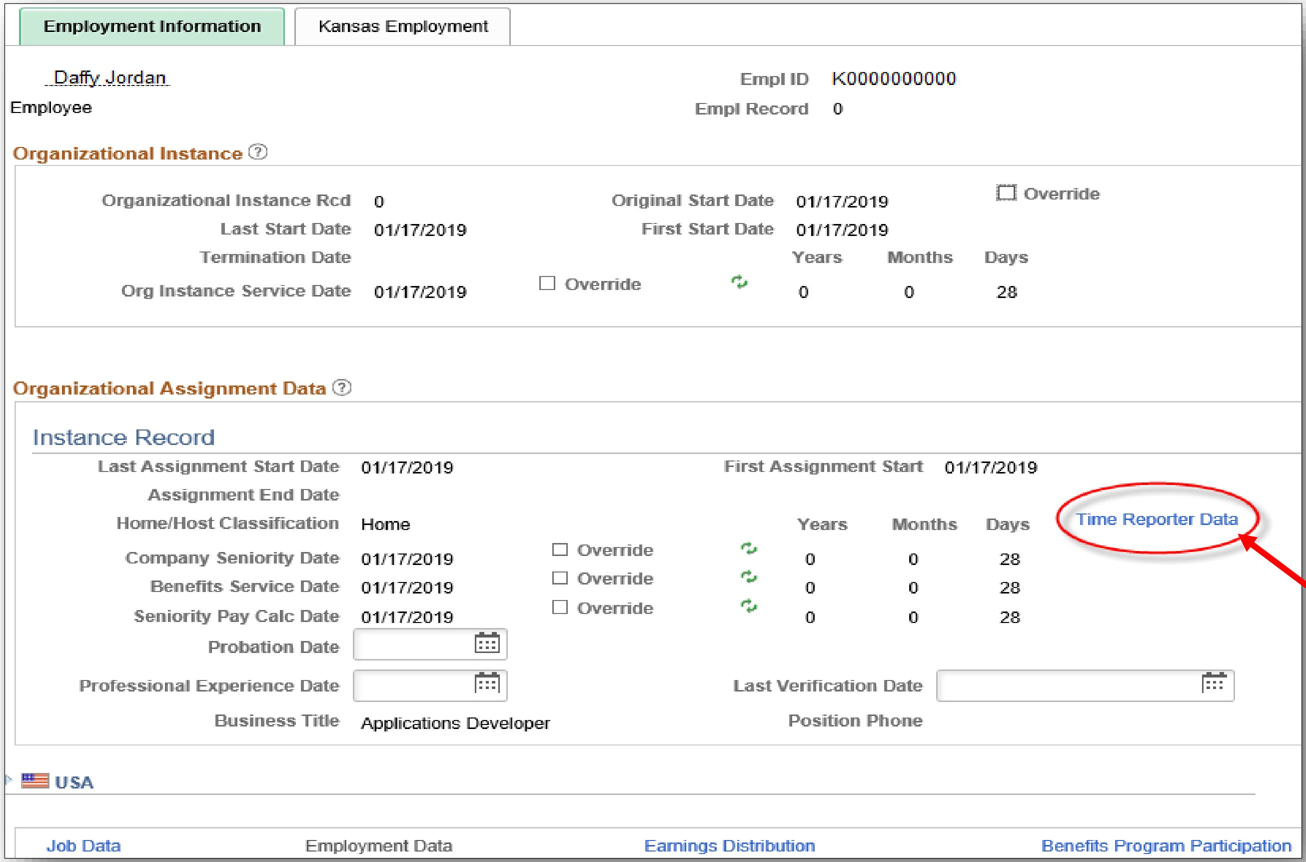
'Imputed Income' is the value of this group term life insurance that is in excess of $50,000. IRS Code Section 79 requires that the cost of coverage in excess of $50,000 be included in the employee's taxable wages and reported on the W2. Imputed income is subject to Social Security and withholding taxes.

Agencies must manually enter or update the Annual Benefits Base Rate (ABBR) amount, which is usually the same as the annual rate. The rate is used to calculate imputed income for all employees enrolled in this group term life insurance. A benefits eligible employee whose ABBR is more than $33,333.33 is subject. Therefore, if the ABBR is incorrect, the imputed income amount may be under- or over-reported as taxable wages on the their W2.

Employment in Multiple Positions: Some employees are actively employed on more than one position but may not be benefits eligible on all of the positions. KPERS regulations require that if an employee has KPERS coverage in one position, all of the positions are considered for imputed income. However, a small group of employees or situations are exempt from this concept: Legislators (legislative group term life is not calculated on an non-benefits eligible positions), Board Members, Foster Grandparents, National Guard, and Student. <u>Do not enter an amount in the ABBR field for these employees.</u>

Appoint Employees to Positions

Hire a New Employee – Time Reporter Data



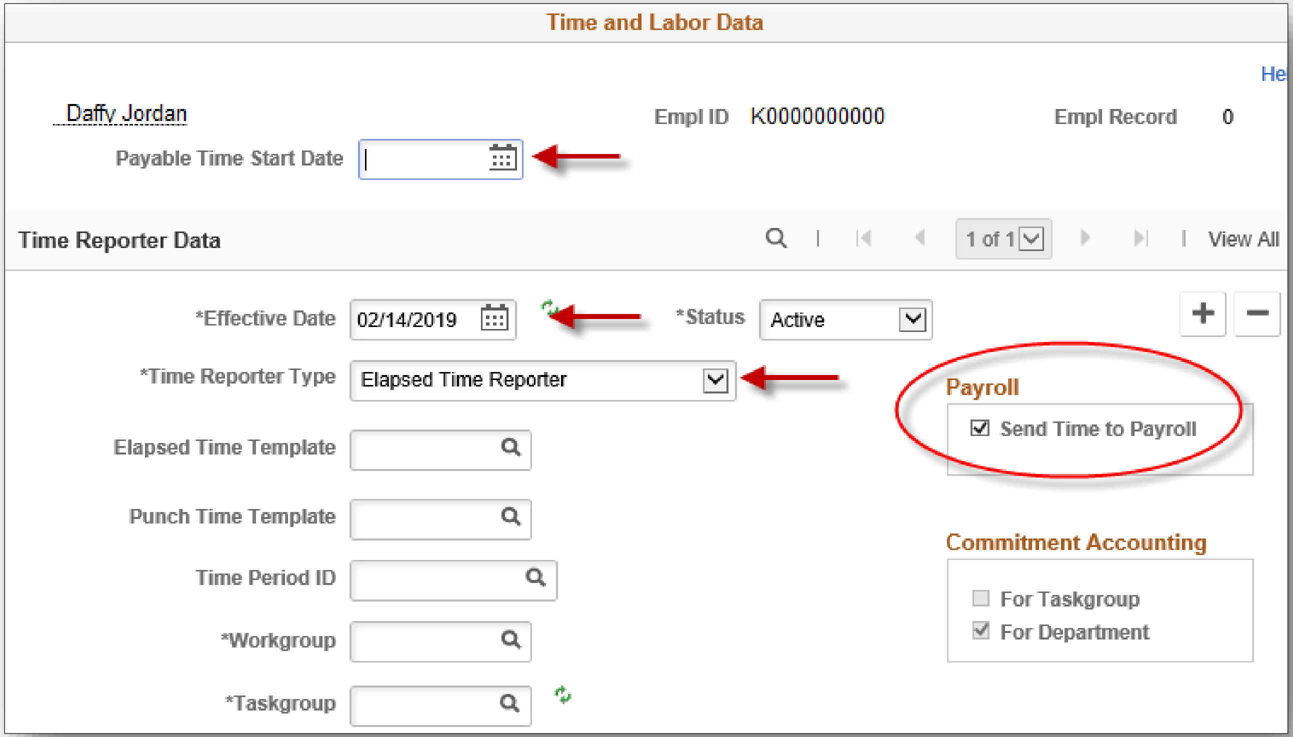
The Employment Information page is discussed elsewhere in this training.

Here we'll discuss the **Time Reporter Data** link on the page and how it's used when hiring a new employee.

Click on this link to move to the Time and Labor Data page to enter Time Reporter Data.

Appoint Employees to Positions

Hire a New Employee – Time Reporter Data



The **Payable Time Start Date** is the date for SHARP to start creating payable time for the employee. This date cannot be earlier than the Job Data effective date or the date the time reporter is enrolled in Time and Labor.

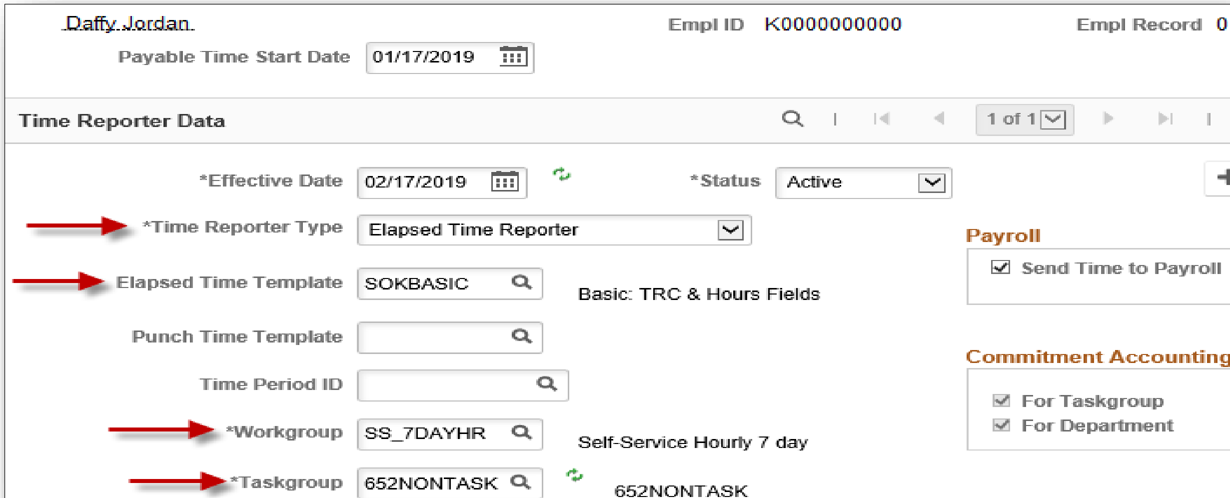
The **Effective Date** and the **Payable Time Start Date** must be the same.

Verify that the **Send Time to Payroll** checkbox is selected.

Time Reporter Type defaults as Elapsed Time Reporter.

Appoint Employees to Positions

Hire a New Employee – Time Reporter Data



Select the **Elapsed Time Template**.

Enter the appropriate **Workgroup** for this employee.

Enter the appropriate **Taskgroup** for the employee.

Click **OK** to return to Job Data pages. Click **Save**.

TASKGROUP: One default taskgroup for employees that doesn't report time to a project is "SOKNONTASK." Funding for this taskgroup is based on the Department Budget Table/Position Pools. If the Elapsed Time Template is "SOKBASIC" the Taskgroup should be "SOKNONTASK" or "Agency Number + NONTASK" (example: 521NONTASK). All other Taskgroups are agency-specific and begin with the 3-digit agency number.

NOTE: Don't enter a Task Profile ID on this page. Doing so could cause any Task Profile ID entered on the timesheet to be overridden, causing time to be charged to incorrect funding.

Also, if your agency interfaces time from a custom time capture system to SHARP, enter the **TCD (Time Control Device) Group** for your agency, which is the 3-digit agency number + 00.

Appoint Employees to Positions

We have completed the steps to hire a new employee in Job Data. Additional information may need to be entered in other SHARP modules such as benefits and retirement and are not discussed in this training.

Appoint Employees to Positions

Add Employment Instance/Concurrent Appt

Many employees have multiple employment record numbers. The ‘0’ employment record number is the only active employment record for most state employees. Other employment records usually represent terminations or separations from former positions the employee held.

You need to determine if you can use an existing record or if you need to add a new employment instance.

Use your SHARP Statewide security access to see if an employee has multiple records. Go to the Job Data search page, enter the Employee ID, and click the search button. If the employee has multiple records, the search results will list the records the employee has been associated with over time. If you have the appropriate security access, select the different records to see which one(s) the employee is active on.

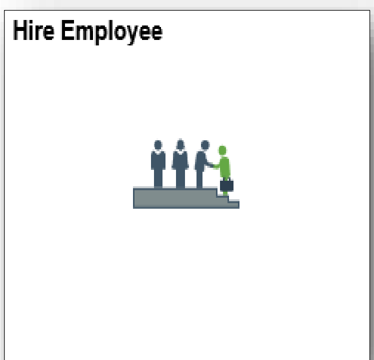
Appoint Employees to Positions

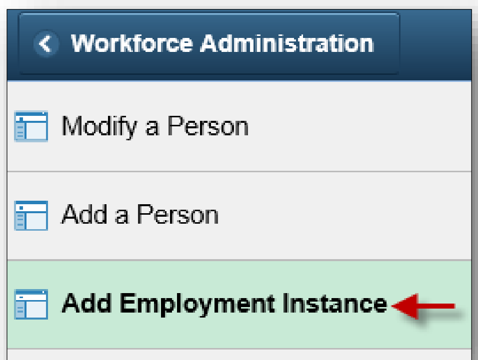
Add Employment Instance/Concurrent Appt

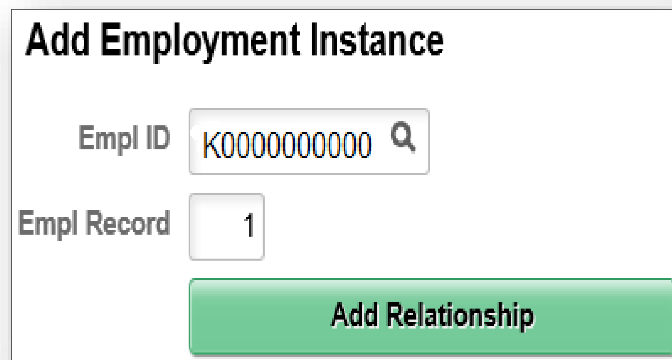
If the employee has multiple records and is **not active on all** of them, then use the lowest record available for your appointment.

If the employee is active on all of their records, use ‘Add Employment Instance’ to add another record for your appointment.

The next available Employment Record Number defaults in when you enter the Employee ID. Click on Add Relationship to continue to Job Data pages to appoint the employee.





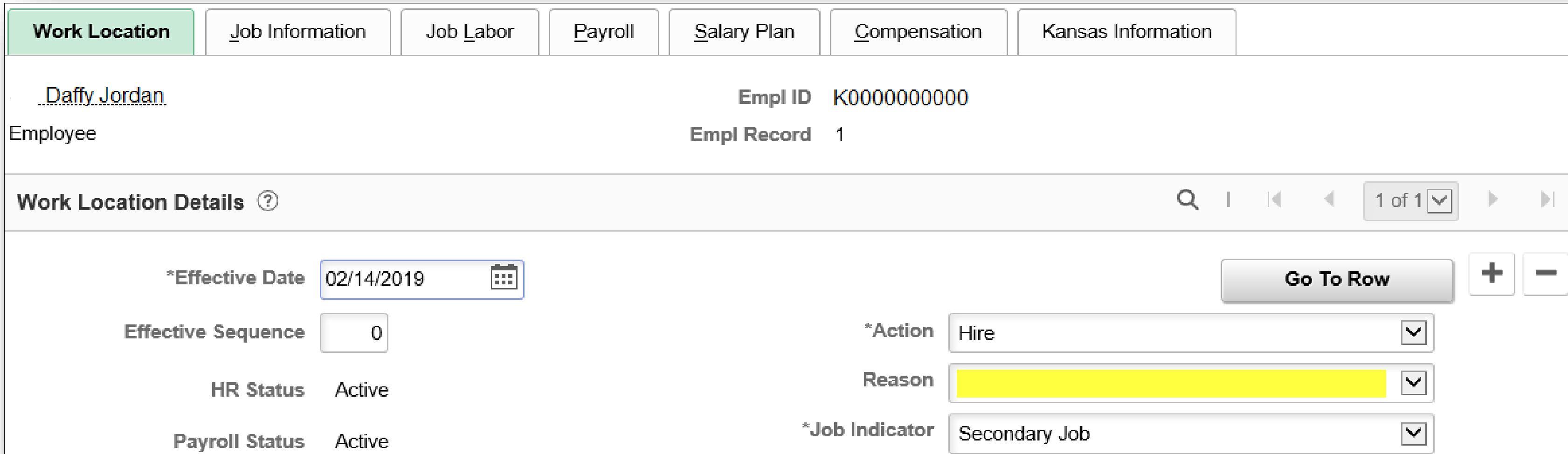


Appoint Employees to Positions

Add Employment Instance/Concurrent Appt

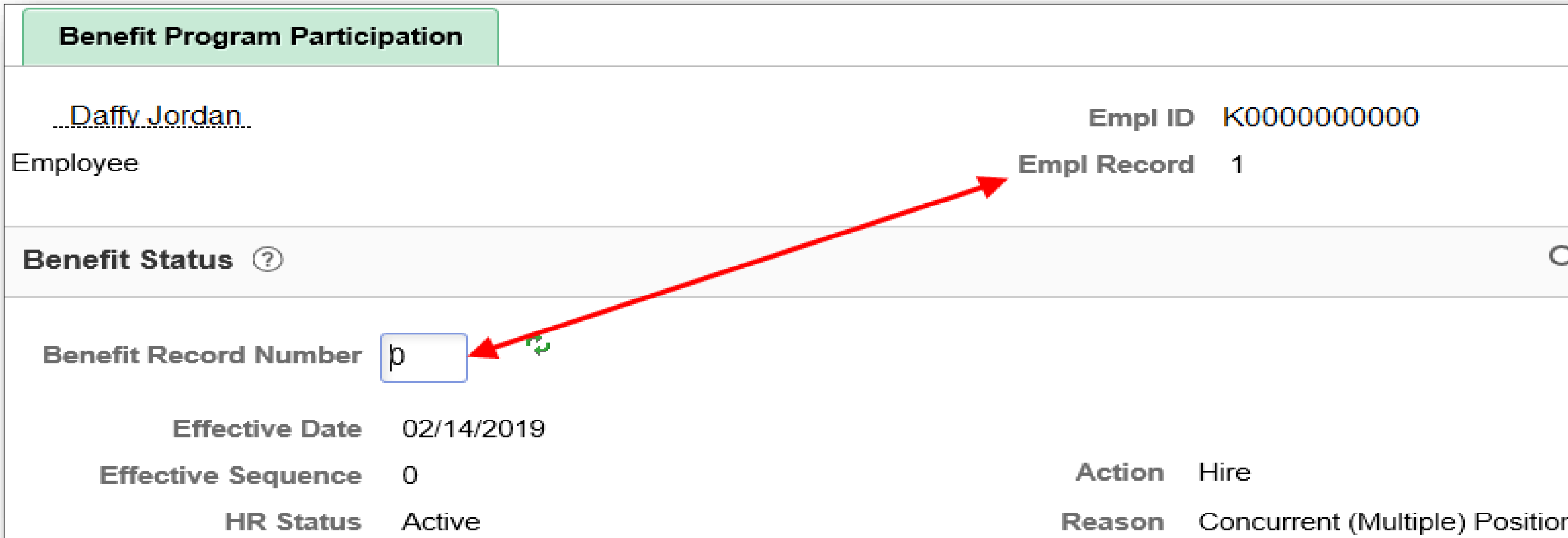
The new Employment Record Number, Effective Date, and 'Hire' Action default (change if appropriate). Select 'Concurrent (Multiple) Position' as the Reason.

Enter the position number to which you are appointing the employee and continue through the pages to hire the employee.



Appoint Employees to Positions

Add Employment Instance/Concurrent Appt



The Benefit Record Number defaults to "0."

If both concurrent jobs are benefits eligible, leave the default as "0" and add a row in the Benefits Program Participation page with an effective date equal to the concurrent hire date. Then change the Benefit Program code appropriately.

Appoint Employees to Positions

Benefit Record Number

The Employment Record Number and Benefit Record Number should always match in the following situations:

- Multiple non-benefits eligible positions (GEN).
- Multiple positions with different benefits eligibility. For example, if an employee is benefits eligible on Employment Record 0 (PT1), the Benefit Record Number should be 0. If the employee is not benefits eligible on Employment Record Number 1 (GEN), the Benefit Record Number should be 1.
- Multiple positions with different job status (active and terminated). For example, if a benefits eligible employee is active on Employment Record 0, then the Benefits Record Number is 0. If the same employee has terminated on Employment Record 1, then the corresponding Benefits Record Number is 1.

If an employee is active on multiple positions in the same agency and both positions are benefits eligible, the Benefit Record Number can be lower than the Employment Record Number. For example, the Benefits Record Number could be 0 for Employment Record 1.

Note: If each active employment record has a unique benefit record number, leave balances are stored for each Employment Record Number. Also, the automatic longevity bonus process splits the bonus into each timesheet for those employees.

Appoint Employees to Positions

Rehire an Employee

The Rehire action is used for anyone who has ever worked for the State, including student employees and former temporary employees. All current and former state employees have an Employee ID number. This number stays the same all through the employee's service with the state, even if the employee moves to a new position or agency. Enter the Rehire on Employment Record Number 0 or the lowest Employment Record in which the employee is not active.

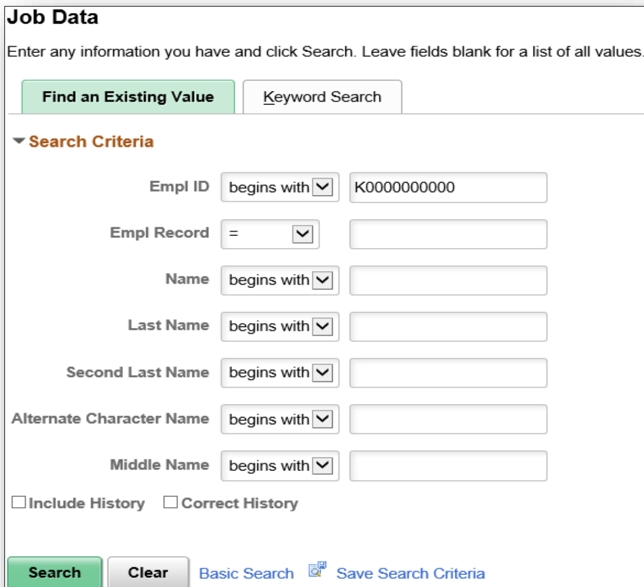
Since SHARP continues to calculate length of service when an employee terminates, you must adjust the length of service if the employee is rehired more than 30 days after termination. Adjust the length of service by deducting the years and/or days of service between the employee's last day of work and the rehire date on the Kansas Employment page. Or you can adjust the Benefits Service Date on the Employment Information page, which is the only field used on that page.

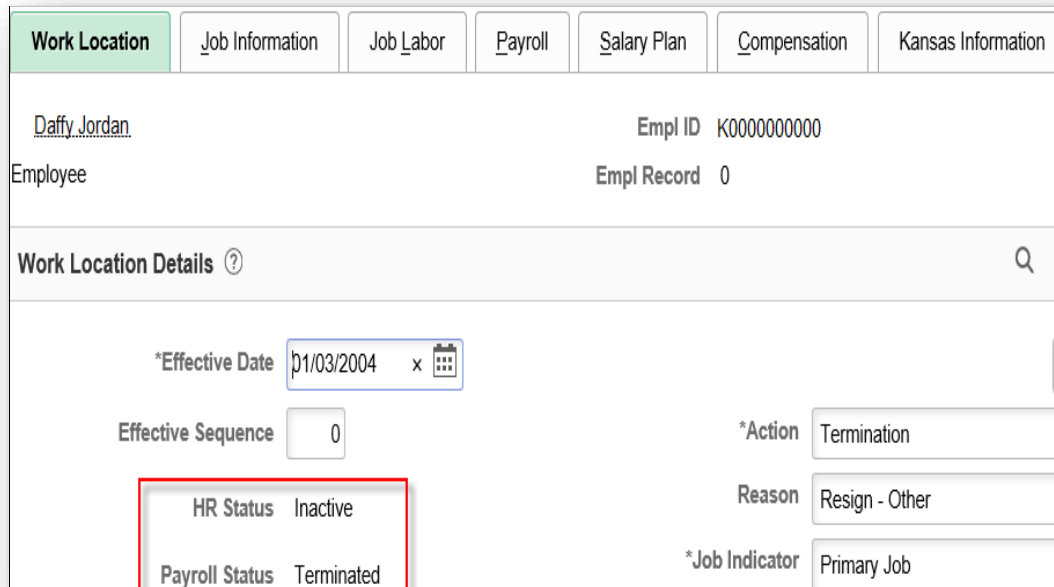
If the employee's last position was not in your agency, you will not have security access to enter the rehire. Contact the HR office at the employee's prior agency or the SHARP unit in the Office of Personnel Services of the Department of Administration to enter the rehire for you. You will have access to the employee's record after the Rehire is entered.

NOTE: If the employee was previously benefits eligible and rehired to non-benefits eligible position, be sure to end their KPERS and Group Term Life enrollment.

Appoint Employees to Positions

Rehire an Employee



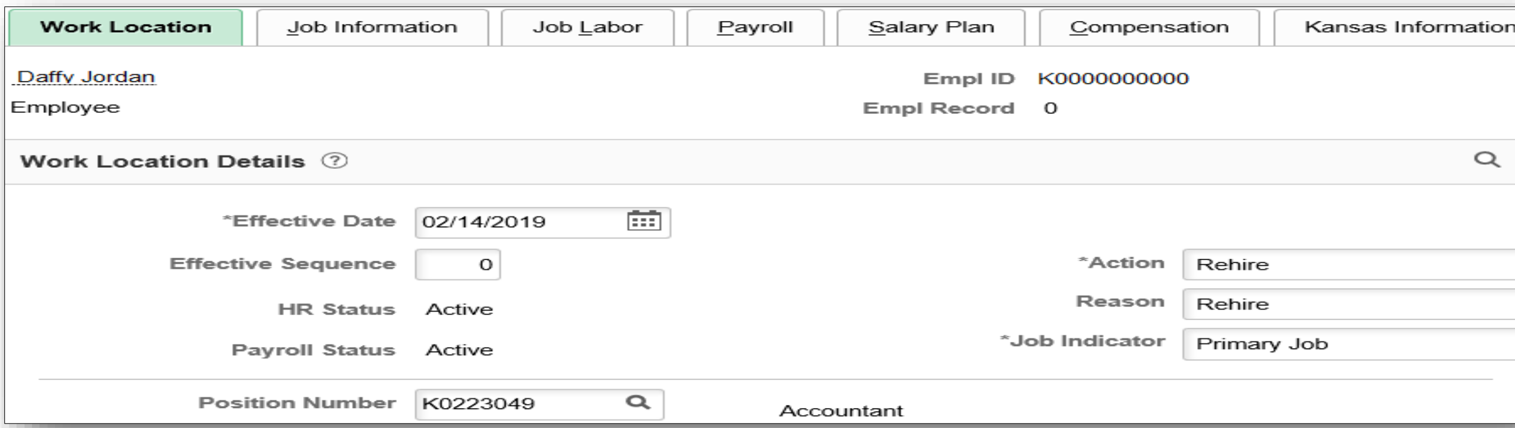


To rehire an employee, enter the Employee ID on the Job Data search page. Remember, you won’t have security access to enter the rehire if the employee’s last position was not in your agency.

The former employee’s HR Status is ‘Inactive’ and the Payroll Status is ‘Terminated.’

Appoint Employees to Positions

Rehire an Employee



Add a row and enter the effective date of the rehire if different from the current date. Select the Rehire action from the drop down list and the appropriate reason (Rehire reasons are listed on the next page). Notice that the employee's HR Status and Pay Status change to Active.

Enter the position number to which you are appointing the employee. Complete the remaining pages (Job Information, Payroll, Salary Plan, Compensation, Kansas Information, Benefits Program Participation, Time Reporter Date) as described in the Hire process earlier and save your information to SHARP.

Note: If the rehired employee uses leave during the first pay period of rehire and the leave code isn't available on the timesheet, you will need to contact SHARP Corrections staff (sharp@ks.gov) to request the employee be manually enrolled in leave plans.

Appoint Employees to Positions

Rehire an Employee

The reason used for the Rehire action depends on factors such as the step to which the employee is appointed and prior permanent status. The following reasons for a Rehire action are taken from the SHARP Action Reason Guide.

Rehire: Rehire a former employee who has not had permanent status for more than 1 year.
Higher Step Rehire – Exceptional Qualifications: Rehire an employee (who has not had permanent status for more than 1 year) at a higher step due to exceptional qualifications such as education, training, experience, and skills. K.A.R. 1-5-8(b)(1)
Higher Step (KAR 1-5-8(b)(2): Rehire an employee at a higher step due to a lack of candidates for a class of positions as authorized by the Director of Personnel Services. K.A.R. 1-5-8(b)(2)
Reinstatement: Rehire an employee who had permanent status and terminated within the previous year. K.A.R. 1-6-30
Higher Step Reinstatement – Exceptional Qualifications: Rehire an employee (who had permanent status and terminated within the previous year) at a higher step if they have exceptional qualifications and you cannot employ the person at minimum step. Exceptional qualifications are based on education, training, experience, skills and other qualifications directly related to the position. K.A.R. 1-5-8(b)(1)
Reemployment: Rehire an employee who was laid off. K.A.R. 1-6-23
Higher Step Reemployment – Exceptional Qualifications: Rehire an employee (who is in a reemployment pool) with exceptional qualifications at a higher step if you cannot employ the person at minimum step. Exceptional qualifications are based on education, training, experience, skills and other qualifications directly related to the position. K.A.R. 1-5-8(b)(1)
Concurrent (Multiple) Position: Rehire an active part-time employee into another part-time position. Percentage of time worked on all positions shall not exceed 100% except for a classified exempt employee holding one or more unclassified teaching or research positions in a state educational institution with appointing authority approval. K.A.R. 1-5-22

Promote, Demote & Transfer Employees

Promote Employee

Compensation changes can now be entered after cutoff on Tuesday at 6:00 p.m. for inclusion in that pay period's calculation. Job changes that include FLSA changes (even future dated) should not be processed once pay sheets are created. Those changes can be entered once final pay calculation has processed.

In the **Classified** service, a promotion occurs when:

- A classified employee moves to a different position with a job classification that is assigned to a higher pay grade and there is an increase in pay.

- A classified employee's position is reallocated to a job classification that is assigned to a higher pay grade. The reallocation entered in Position Data inserts a row into the employee's Job Data with a blank step. Agencies must add an effective sequence Job Data row with the same effective date as the reallocation row, select the appropriate action and reason (such as Promotion/Promotion), enter the step and update compensation.

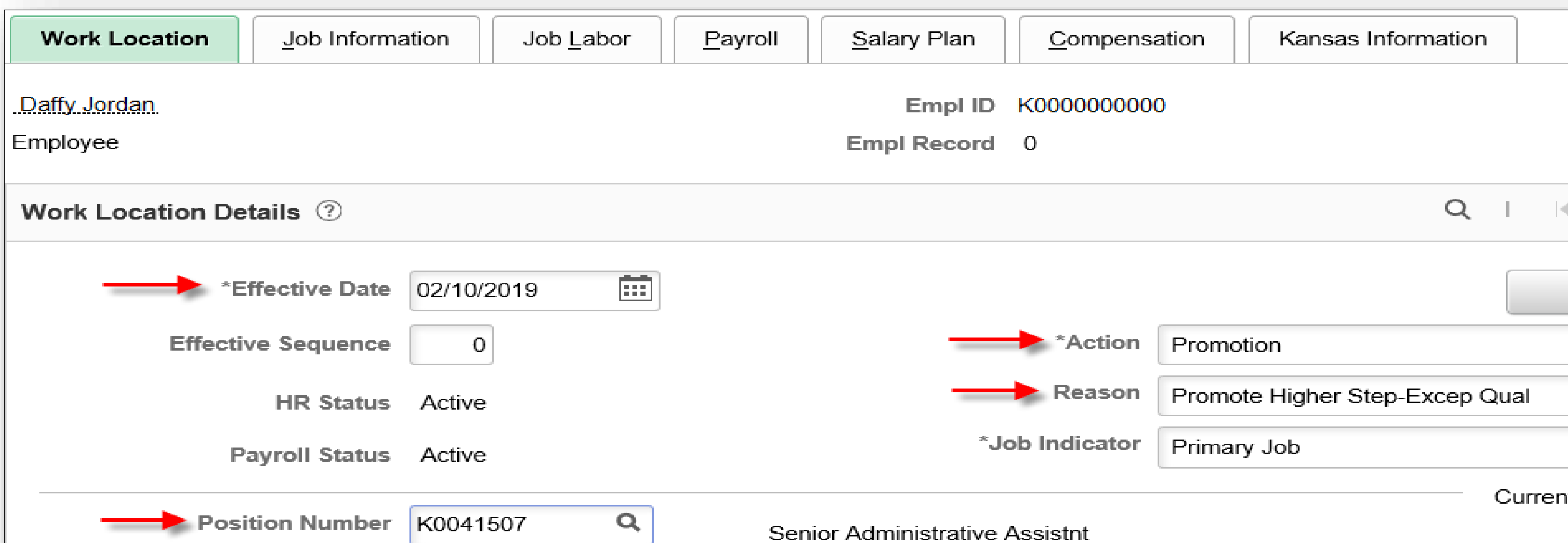
If there is a change in the FLSA status or movement between agencies, the promotion should occur at the beginning (Day 1) of the payroll period for accurate processing of payroll.

Let's look at an example of a classified employee who moves to a different position that is in a job classification on a higher pay grade. The employee is appointed at a step higher than their previous step due to exceptional qualifications as outlined in K.A.R. 1-5-12. This regulation allows an agency to promote an employee at a higher step for exceptional qualifications based on education, training, experience, skills and other qualifications directly related to the position.

Promote, Demote & Transfer Employees

Promote Employee

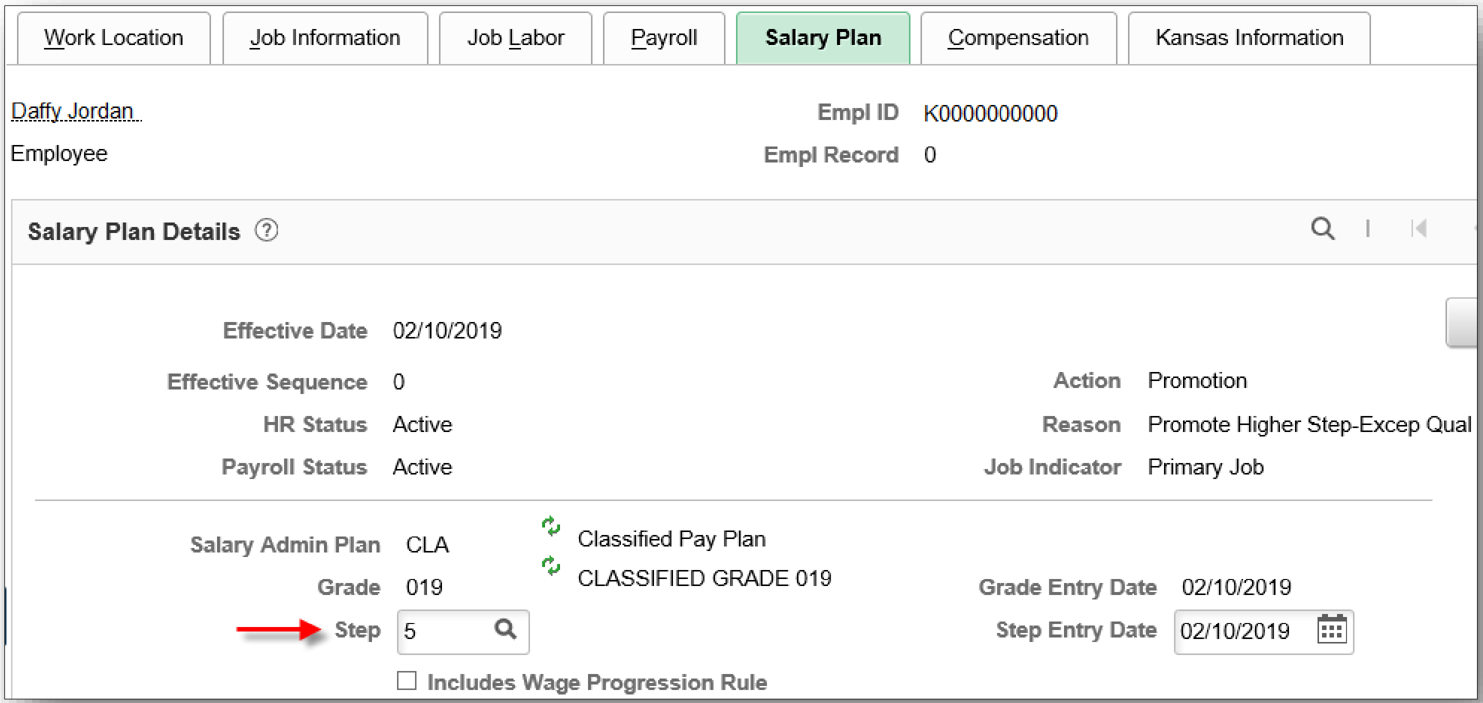
Currently, Daffy is an Administrative Assistant (Pay Grade 17/Step 4) and is promoting to a Senior Administrative Assistant position at a higher step due to exceptional qualifications. Add a row in Job Data and change the effective date to the date of the promotion. Use the Action of ‘Promotion’ and the Reason of ‘Promote Higher Step-Excep Qual’. Enter the position number and tab out of the field. Information related to the position defaults, such as the position title and department.



Promote, Demote & Transfer Employees

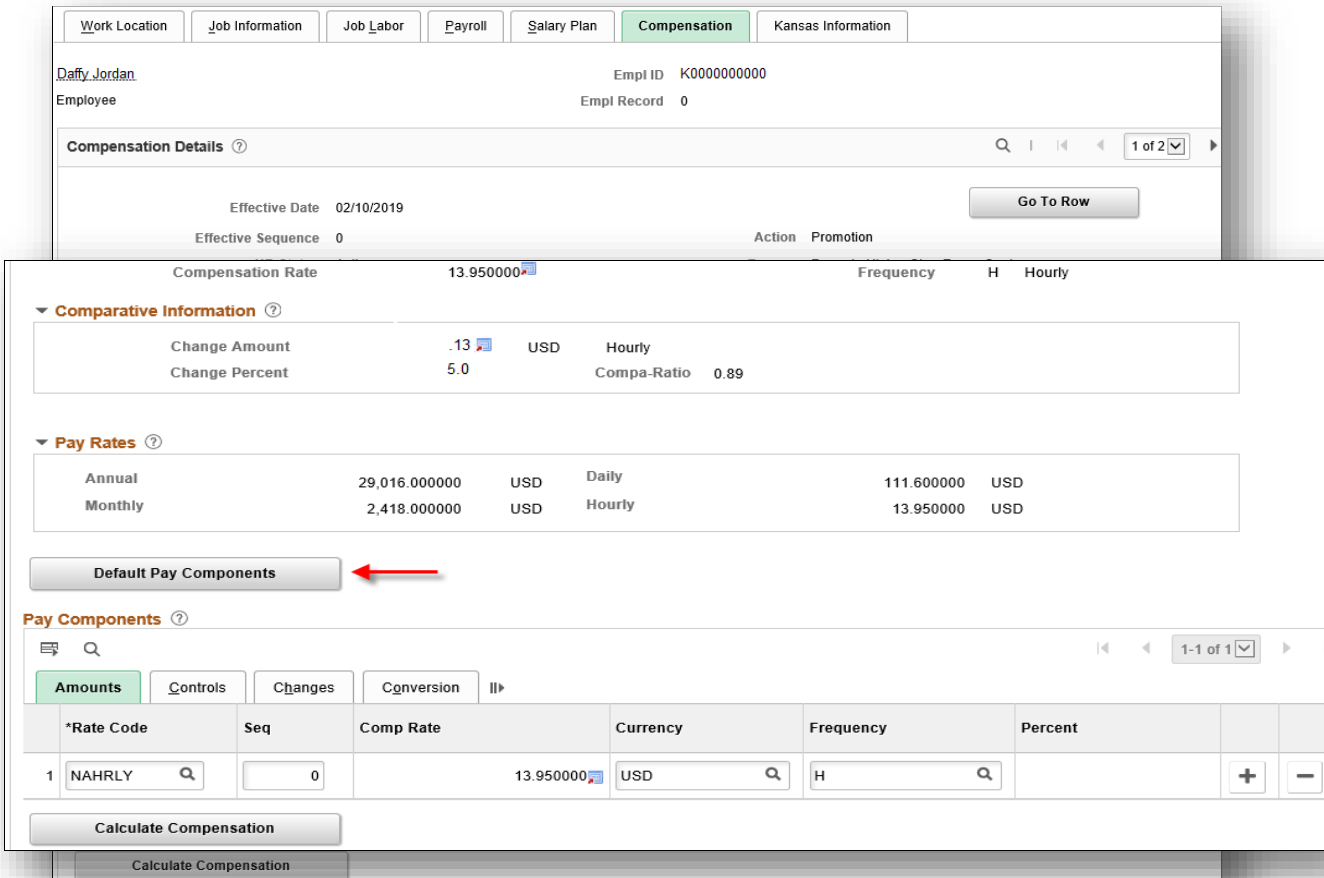
Promote Employee

On the **Salary Plan page**, change the step from the default of Step 4 to Step 5 since the employee is promoting at a higher step than their previous step. Both the Grade Entry Date and Step Entry Date changes to the effective date of the promotion since the Grade and Step both changed.



Promote, Demote & Transfer Employees

Promote Employee



Compensation Page: Click the **Default Pay Components** button to update the hourly Comp Rate.

Remember, classified positions are attached to the Classified Salary Plan which has specific salary rates for grades/steps.

Other compensation rates also update, such as the Change Amount, Change Percent, and Annual Rate.

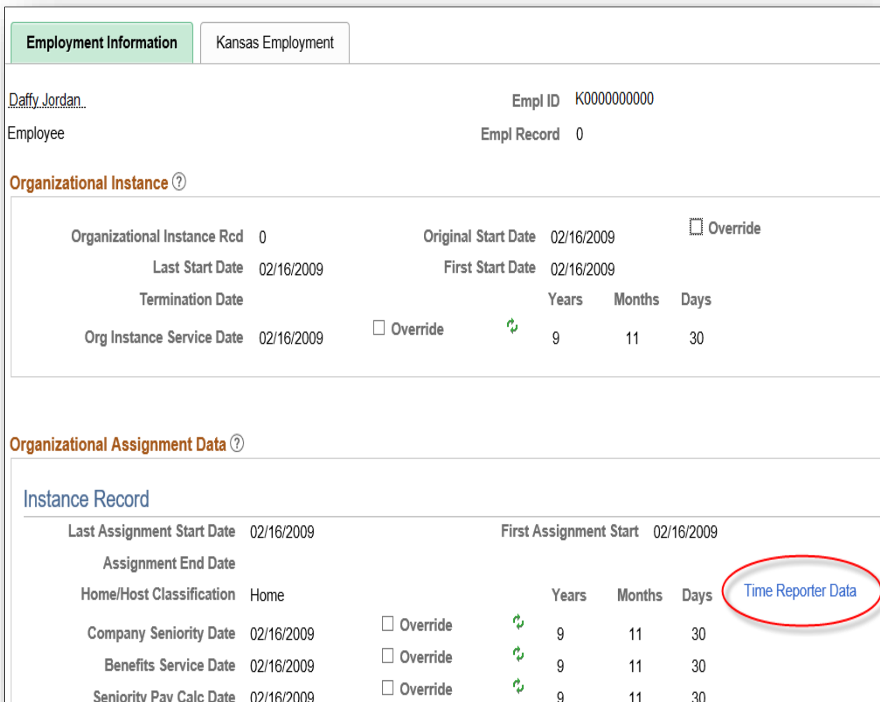
❑ Promote, Demote & Transfer Employees

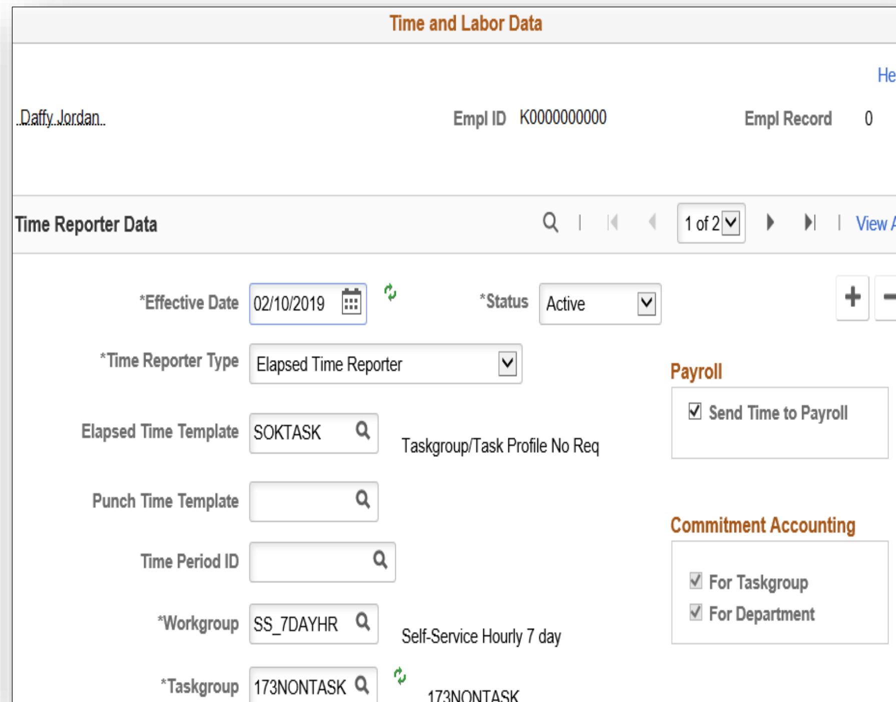
❑ Promote Employee

Go to the **Employment Information** page to access the **Time Reporter Data** link to Time and Labor Data.

Update the Time and Labor Data as appropriate.

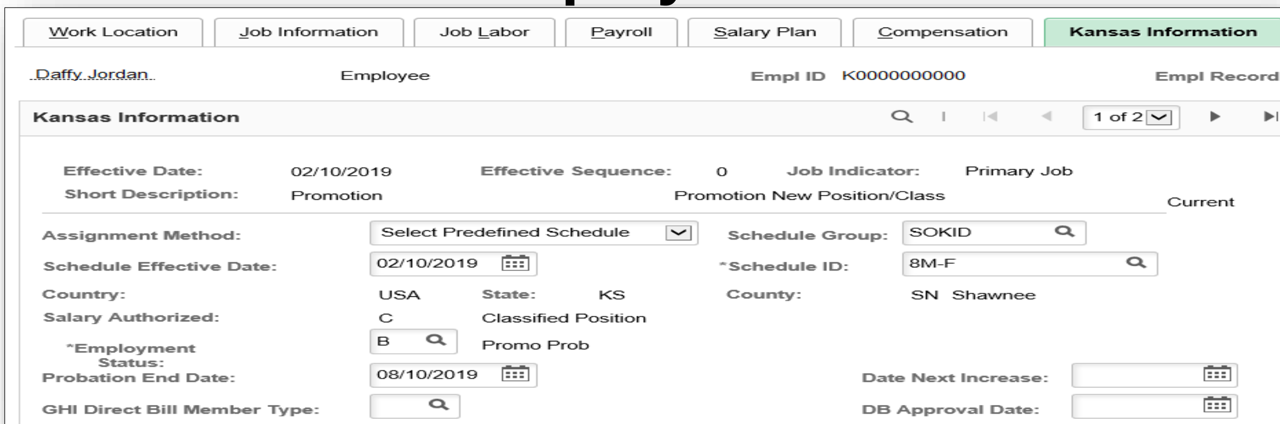
Click OK to return to Job Data pages.





Promote, Demote & Transfer Employees

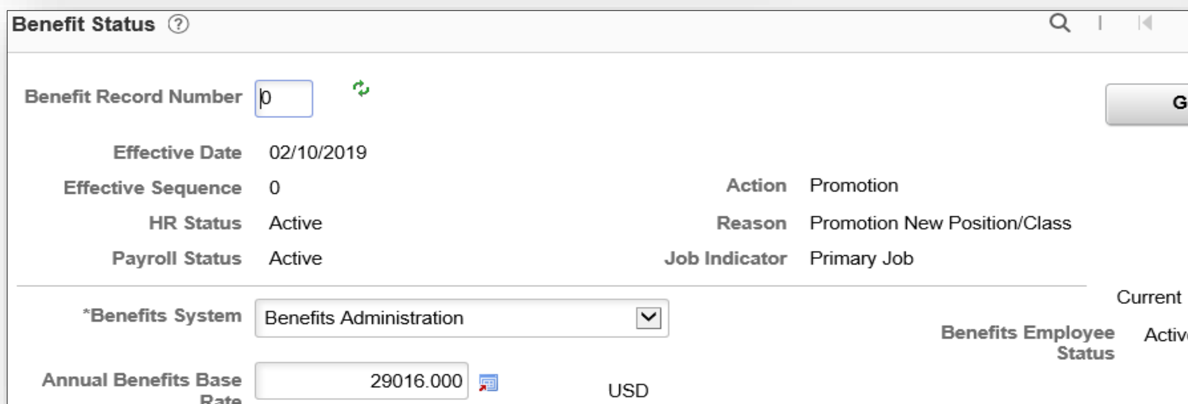
Promote Employee



Kansas Information page: The Promotion action triggers the Employment Status to change to Promotional Probation and sets the Probation End Date.

Benefit Program Participation page: Manually update the Annual Benefits Base Rate.

Do not change the benefits eligibility fields if the employee's pay changes unless the percent FTE changes. Click the **Save** button when all of the updates are done.



Promote, Demote & Transfer Employees

Promote Employee

The Reason selected for the Promotion action in Job Data depends on several factors. This excerpt from the SHARP Action Reason Guide explains the various Reasons for a **Promotion for a Classified employee**.

Higher Step (KAR 1-5-8(b)(2): Promote a classified employee at a higher step due to a lack of candidates for a class of positions as authorized by the Director of Personnel Services. K.A.R. 1-5-8(b)(2)

Promote Higher Step – Exceptional Qualifications: Promote a classified employee with exceptional qualifications at a higher step if cannot employ the person at minimum step. Exceptional qualifications are based on education, training, experience, skills and other qualifications directly related to the position. K.A.R. 1-5-13

Promotion New Position/Class - Use when a classified employee moves to a different position with a job classification assigned to a higher pay grade. K.A.R. 1-5-13

From Training Class - Promote a classified employee from a training class upon meeting the minimum qualifications for the class and satisfactory performance of job duties, responsibilities and training requirements. K.A.R. 1-6-22a(d)

Unclassified to Classified – Promote an employee from an unclassified position to a classified regular position at a higher rate of pay. K.A.R. 1-7-4(h). Note: When an employee moves from an unclassified to a classified regular position the Employment Status must be Original Probation.

Promote, Demote & Transfer Employees

Promote Employee to an Unclassified Position

In the Unclassified service, a promotion occurs when a classified or unclassified employee moves to an unclassified position with an increase in pay.

The steps to enter an unclassified promotion are similar to a classified promotion except as noted below:

- Action/Reason is **Promotion/Unclassified Promotion** on the Work Location page
- **Manually enter the Rate Code of NAHRLY and hourly rate** on Compensation page
- Click the **'Calculate Compensation' button** to update pay rates.

<u>Unclassified Promotion </u>- Promote an employee from a classified or unclassified position to an unclassified position at a higher rate of pay. *Also use when an unclassified employee's position has a job code or title change and the employee's pay increases*.

Promote, Demote & Transfer Employees

Demote Employee

A Demotion occurs when an employee moves to a position in a lower class, whether voluntarily or for disciplinary reasons, with a decrease in pay. However, an employee accepting a voluntary demotion may be paid at a step of the new pay grade that does not result in a decrease if the action is in the best interest of the state. K.A.R. 1-5-15 and K.A.R. 1-6-27

- Add a row in the employee's Job Data and enter the effective date of the demotion.
- Select the 'Demotion' action from the drop down list and the appropriate reason from the drop down list.
- Enter the position number to which the employee is moving.
- Continue through the pages (Salary Plan, Compensation, Kansas Information, and Benefits Program Participation) to enter salary and other information.

Promote, Demote & Transfer Employees

Demote Employee

The Reason selected for the Demotion action in Job Data depends on several factors. This excerpt from the SHARP Action Reason Guide describes the various Reasons for Demoting a Classified employee.

Voluntary: At the classified employee's request, move the employee from a position in one class to a position in another class having a lower pay grade. K.A.R. 1-6-27

Involuntary: Move a classified employee from a position in one class to a position in another class having a lower pay grade for disciplinary purposes or other good cause. K.A.R. 1-6-27; K.S.A. 75-2949

In Lieu of Layoff: Move a classified employee who is exercising bumping rights to a position in another class having a lower pay grade in accordance with the agency layoff plan. K.A.R. 1-14-10

Unsatisfactory Performance: Move a classified employee from a position in one class to a position in another class having a lower pay grade for unsatisfactory performance of duties. K.A.R. 1-6-27; K.S.A. 75-2949

Unclassified to Classified: Move an employee from an unclassified position to a classified regular position at a lower rate of pay.

Conversion: Central use only. Used for changes associated with PeopleSoft upgrades. Agencies should not use this code.

Promote, Demote & Transfer Employees

Transfer Employee

In the **Classified** service, a transfer occurs when an employee moves to a different position with the same job classification or a job class.

In the **Unclassified** service a transfer occurs when an employee moves to a different unclassified position at a similar or lower rate of pay.

The Reason selected for the Transfer action in Job Data depends on several factors. This excerpt from the SHARP Action Reason Guide describes the various Reasons for Transferring an employee.

<u>Employee Request</u>:

Classified: Classified employee moves to a different classified position (within an agency or between agencies) with the same job classification or a job class with the same pay grade. K.A.R. 1-6-24

Unclassified: Unclassified employee moves to a different unclassified position (within an agency or between agencies) at a similar or lower rate of pay.

Between Services: Employee moves from either branch of service (Classified or Unclassified) to a position in the other branch of service at a similar or lower rate of pay.

Promote, Demote & Transfer Employees

Transfer Employee

Employer Request:

Classified: The appointing authority moves a classified employee to a different classified position (within an agency or between agencies) with the same job classification or a job class with the same pay grade. K.A.R. 1-6-24

Unclassified: The appointing authority moves an unclassified employee to a different unclassified position (within an agency or between agencies) at a similar or lower rate of pay.

Between Services: The appointing authority moves an employee from either branch of service (Classified or Unclassified) to a position in the other branch of service at a similar or lower rate of pay.

Employer Request with In-Grade Pay Increase:

Classified: The appointing authority moves a classified employee to a different classified position (within the same agency) in the same pay grade at a higher step. K.A.R. 1-5-14(c)

Higher Step (KAR 1-5-14):

Classified: Within the same agency, transfer an employee to a position in the same grade at a higher step.

Unclassified to Classified: Move an employee from an unclassified position to a regular classified position at the same or similar rate of pay.

In Lieu of Layoff: Transfer an employee who would otherwise be terminated due to layoff.

Appoint Employees to Positions

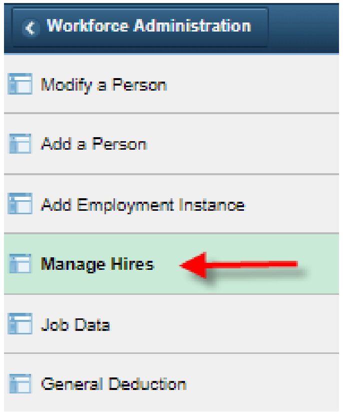
Manage Hires Process

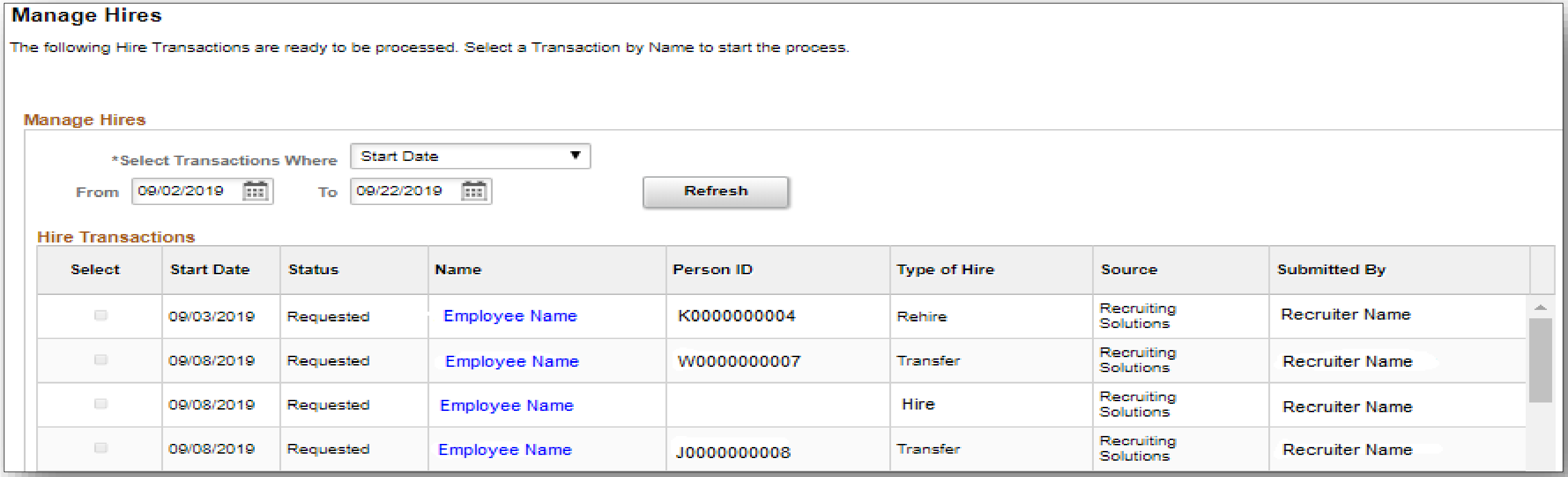
After the recruitment process, a job offer is made and accepted. Agencies may use the Prepare for Hire and Manage Hires pages to process hires, transfers, promotions, demotions, and rehires. Using this process allows automatic applicant rejection, Job Opening closing in Recruitment (when conditions are met), and also maintains a link between the Job Opening and the job/position which is helpful for reporting. Please see the Recruitment CBT's for detailed information on applicants, Job Openings, and Job Postings.

Appoint Employees to Positions

Manage Hires Process

Path: Workforce Administration Homepage > Hire Employee Tile > Manage Hires





Manage Hires

The following Hire Transactions are ready to be processed. Select a Transaction by Name to start the process.

Manage Hires

*Select Transactions Where: Start Date

From: 09/02/2019 To: 09/22/2019 Refresh

Hire Transactions

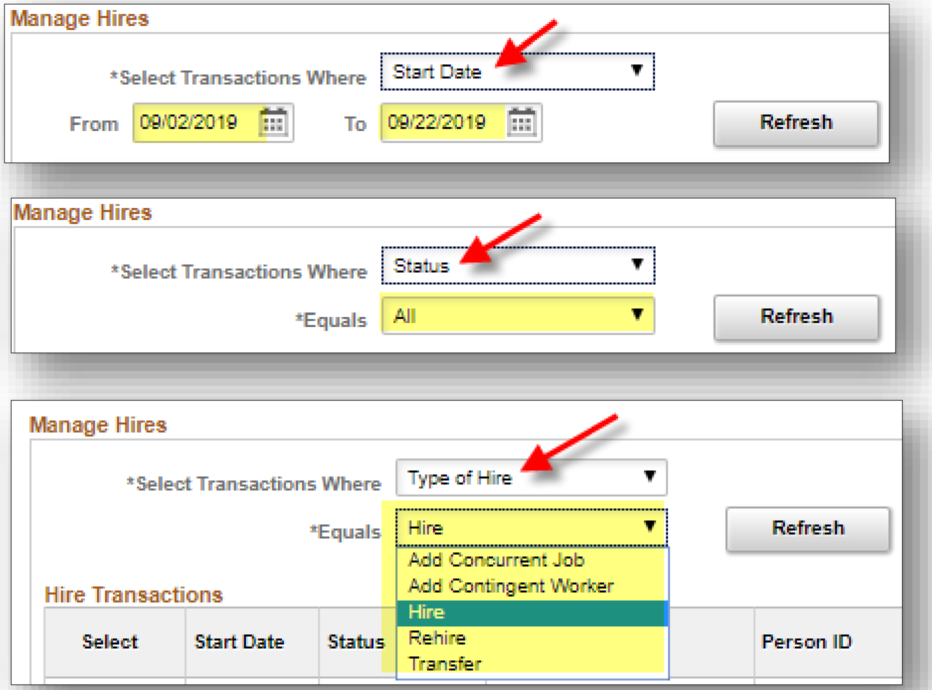
Select	Start Date	Status	Name	Person ID	Type of Hire	Source	Submitted By
	09/03/2019	Requested	Employee Name	K0000000004	Rehire	Recruiting Solutions	Recruiter Name
	09/08/2019	Requested	Employee Name	W0000000007	Transfer	Recruiting Solutions	Recruiter Name
	09/08/2019	Requested	Employee Name		Hire	Recruiting Solutions	Recruiter Name
	09/08/2019	Requested	Employee Name	J0000000008	Transfer	Recruiting Solutions	Recruiter Name

Appoint Employees to Positions

Manage Hires Process

The Manage Hires page shows a list of applicants who are sent from Recruitment and are ready to be hired.

In the **'Select Transactions Where'** drop down field choose to search by:



Start Date (enter From and To Dates)

OR

Status (dropdown options)

OR

Type of Hire (dropdown options)

Source will always be 'Recruiting Solutions'.

Click the *Refresh* button.

Appoint Employees to Positions

Manage Hires Process

Manage Hires

The following Hire Transactions are ready to be processed. Select a Transaction by Name to start the process.

Manage Hires

*Select Transactions Where: Start Date

From: 09/02/2019 To: 09/22/2019 Refresh

Hire Transactions

Select	Start Date	Status	Name	Person ID	Type of Hire	Source	Submitted By
	09/03/2019	Requested	Employee Name	K0000000004	Rehire	Recruiting Solutions	Recruiter Name
	09/08/2019	Requested	Employee Name	W0000000007	Transfer	Recruiting Solutions	Recruiter Name
	09/08/2019	Requested	Employee Name		Hire	Recruiting Solutions	Recruiter Name
	09/08/2019	Requested	Employee Name	J0000000008	Transfer	Recruiting Solutions	Recruiter Name

Select All Deselect All

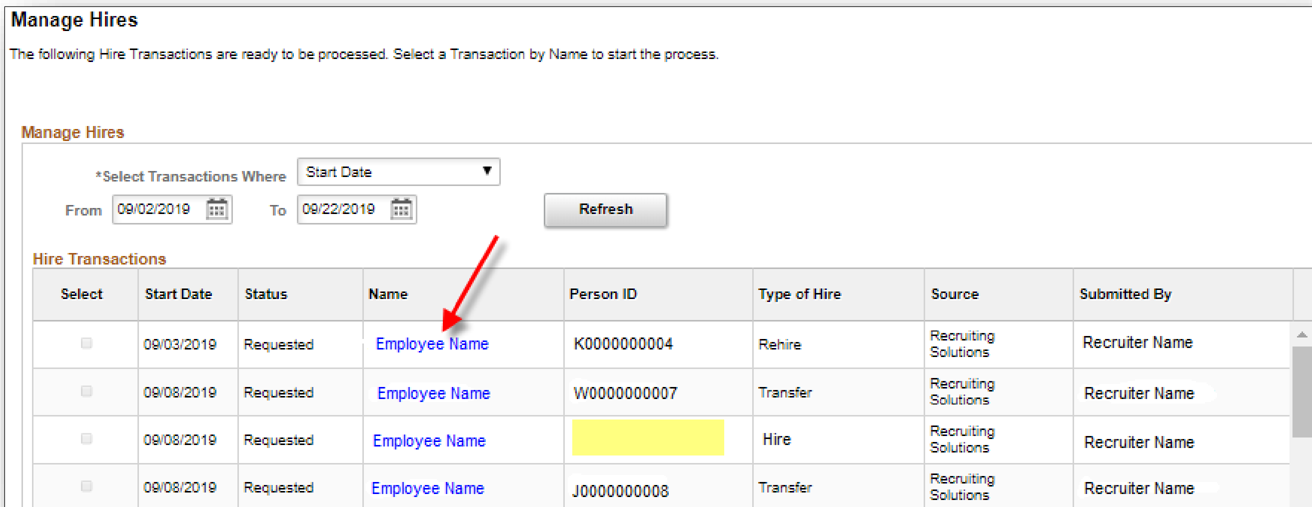
Cancel Selected Transactions

The State of Kansas does not use the ‘Cancel Selected Transactions’ button *at this time*.

If you don’t see the Transfer or Rehire option in Manage Hires, but the person is a current or former employee, this means the Recruiter did not change the Applicant Type to ‘Employee’ and did not enter the ‘Employee ID’ prior to preparing the hire. See Recruitment CBT, Prepare for Hire section, for instructions on to resubmit the request to Manage Hires. Optionally, the hire can be completed through the other processes outlined in the Workforce Administration CBT.

Appoint Employees to Positions

Manage Hires Process



Manage Hires

The following Hire Transactions are ready to be processed. Select a Transaction by Name to start the process.

Manage Hires

*Select Transactions Where: Start Date

From 09/02/2019 To 09/22/2019 Refresh

Hire Transactions

Select	Start Date	Status	Name	Person ID	Type of Hire	Source	Submitted By
	09/03/2019	Requested	Employee Name	K0000000004	Rehire	Recruiting Solutions	Recruiter Name
	09/08/2019	Requested	Employee Name	W0000000007	Transfer	Recruiting Solutions	Recruiter Name
	09/08/2019	Requested	Employee Name		Hire	Recruiting Solutions	Recruiter Name
	09/08/2019	Requested	Employee Name	J0000000008	Transfer	Recruiting Solutions	Recruiter Name

View the Person ID column – if it is blank then the person does not have a personal data record.

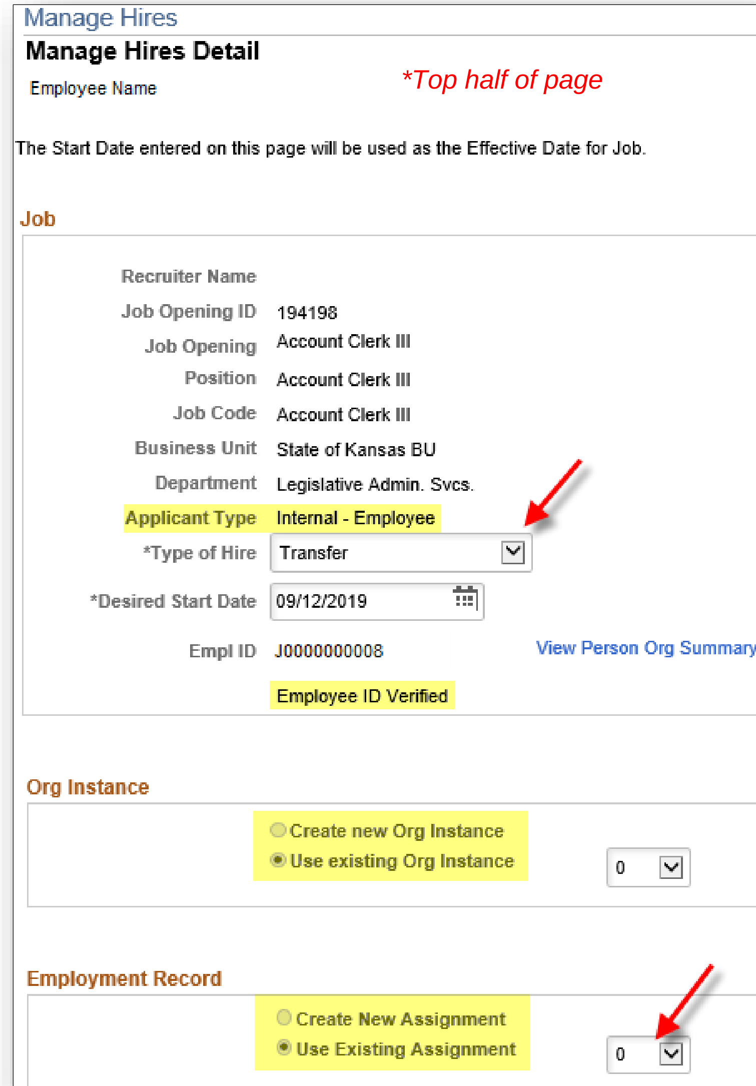
Click the person's Name link to go to the Manages Hires Detail page.

Lesson 2: Workforce Administration Transactions

Appoint Employees to Positions

Manage Hires Process

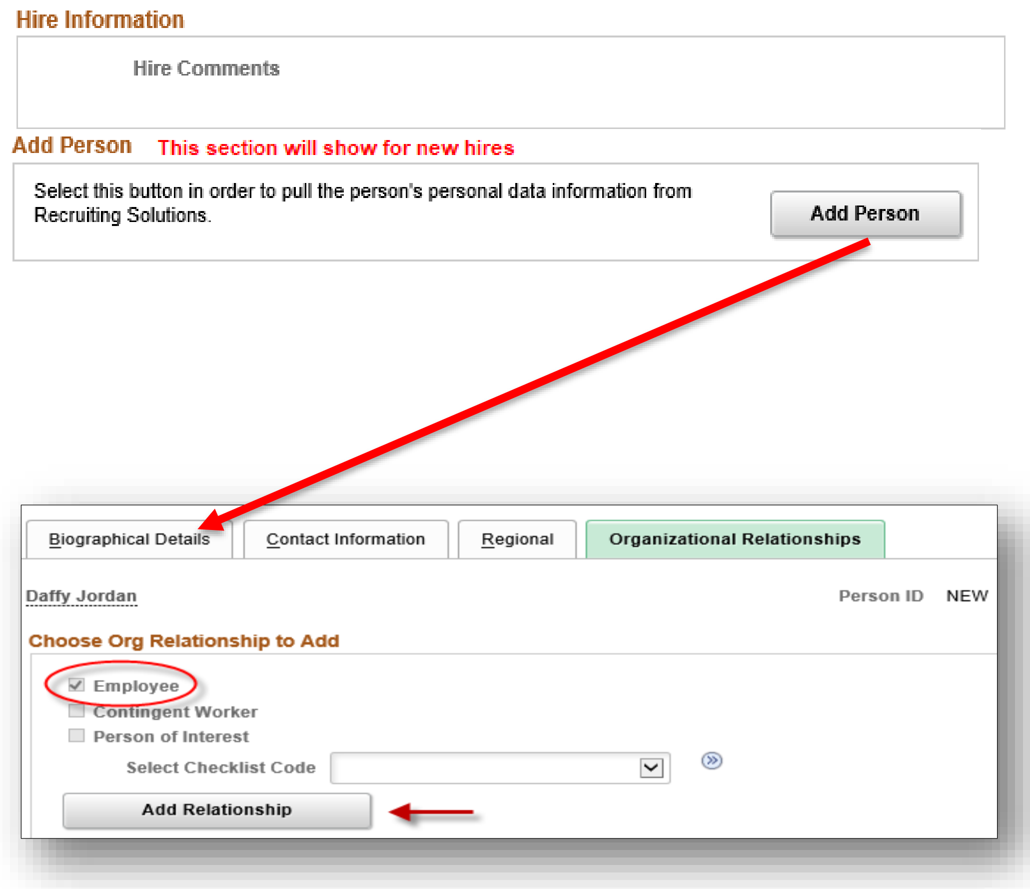
- Review information to ensure it is correct
- **Applicant Type** determines if the Empl ID field is populated. If an Employee ID shows, there is also a message stating if the Recruiter verified the ID
- ‘**Type of Hire**’ options displayed in the dropdown are based on the Applicant Type. **NOTE:** Choosing the correct type is important as it determines where in SHARP you are directed, Personal Data or Job Data. Once in Job Data, the action code can be updated if needed. For example, ‘Transfer’ can be updated to show as a Promotion or Demotion in Job Data
  - Hire: External – External Applicant
  - Rehire, Transfer: Internal – Employee (current or former)
- Update the ‘**Desired Start Date**’, this date will transfer over to Personal Data or Job Data once the ‘Add’ button is clicked
- **Org Instance** should match Employment Record
- **Employment Record** is the Employment Record number on which the employee will be hired. New hires should always be 0. For current employees, review the record numbers the employee currently has in Job Data prior to this process to ensure you know which Employment Record number should be used. See the Empl Record section in the Lesson 1: Workforce Administration CBT for details.



Appoint Employees to Positions

Manage Hires Process

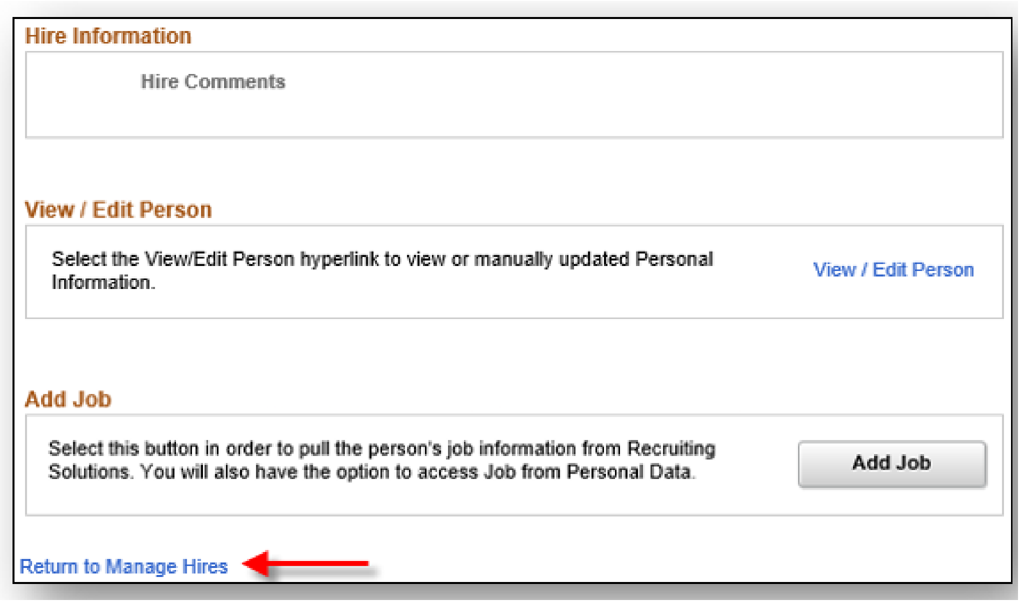
- **Hire Information** displays comments or messages from the Recruiter or Recruitment system.
- **Add Person** will only show when hiring new hires/external applicants. Click on ‘Add Person’ button which will route you to ‘Personal Data’ where their personal applicant data will be displayed (imported from Recruitment system). Review information on all 4 pages and update if needed. **Ensure Personal Data effective date is less than or equal to the Job Data effective date.** Once reviewed/updated, click the ‘Add Relationship’ button to return to the Manage Hires Detail page. DO NOT CLICK SAVE.



Appoint Employees to Positions

Manage Hires Process

- **View/Edit Person** shows after an applicant has an Employee ID Number and Personal Data record. Click this link to make additional updates.
- **Add Job** is now visible, click to move forward to enter Job Data. Some recruitment data is transferred from the Job Opening. Complete Job Data as instructed previously in CBT, and click SAVE.
- **Return to Manage Hires** is used if you need to return to the main Manage Hires page.



Once the Manage Hires process is finished the applicants' Disposition is updated accordingly. Please review the Recruitment CBT's for more information regarding Job Openings.

Suspending and Returning Classified Employees

A permanent classified employee may be suspended for disciplinary purposes for a period not to exceed 30 calendar days. A suspension for an exempt employee cannot be less than the employee's work week of 7 consecutive 24 hour periods, or multiples of such work week unless the suspension is in good faith for an infraction of a safety rule of major significance. See K.A.R. 1-9-19 and K.S.A. 75-2949

Note: If an employee is due a longevity bonus while on suspension, the employee appears on the Inactive page of the Longevity Bonus pages because their Employee Status is Suspended instead of Active.

The Reason selected for the Suspension action in Job Data depends on several factors. This excerpt from the SHARP Action Reason Guide describes the various Reasons for Suspending a Classified employee.

Personal Conduct: K.S.A. 75-2949
Work Performance: K.S.A. 75-2949
Safety Violation: K.S.A. 75-2949

Return Employee from Suspension
When you return an employee from suspension, add a row in Job Data and enter the effective date they start back to work. Use the Action/Reason of “Recall From Suspension/Return From Suspension.”

Acting Assignment

Leave of Absence to Accept Unclassified Appointment

A leave of absence may be granted to an officer or employee holding a regular position in the classified service to enable the employee to take an appointive position in the unclassified service. The leave of absence from the classified position and subsequent appointment to the unclassified position are entered on the same employment record.

Add a row in Job Data with the action/reason of **Data Change/Leave to Take Unclassified** to place the employee on leave from the classified position. Then add another Job Data row with the same effective date to appoint the employee to an unclassified position. If the employee's FLSA status changes, the effective date should be at the beginning of a payroll period for accurate payroll processing.

Enter the appropriate reason from below to appoint the employee to the unclassified position:

Unclass Assign KAR 1-9-6(e): Appoint an employee to an unclassified position after placing them on leave of absence from a classified regular position. K.S.A. 75-2947(c) and K.A.R. 1-9-6(e)

Unclas Act Asgn KSA 75-4315(a): Appoint a classified or unclassified employee to an acting assignment on an unclassified position. If a classified regular employee, place the employee on leave of absence prior to appointing to the unclassified acting assignment. K.S.A. 75-4315(a) and K.A.R. 1-9-6(e)

Acting Assignment

Return From Leave of Absence to Accept Unclassified Appt

Return from Leave of Absence on Unclassified Assignment
At the end of service in the unclassified position, the employee returns from leave of absence to the classified service.

Add a row in Job Data with the action/reason of **Data Change/Return from Acting Assignment** to return the employee from their unclassified position back to their classified position.

When a classified employee returns from a leave of absence, be sure to determine if the next increase date needs to be changed.

If the employee's FLSA status changes, the effective date should be at the beginning of a payroll period for accurate payroll processing.

Acting Assignment

Classified Acting Assignment

An appointing authority may appoint a permanent employee to an acting assignment when a classified position will be vacant for more than 30 days (such as due to illness or lengthy recruitment process).

Acting assignments should not exceed one year unless approved by the Director of Personnel Services. Agencies can future date the expected date of return.

Since acting assignments cannot be retroactive, be sure to identify acting assignment needs in advance. See K.A.R. 1-6-29

- Add a row in Job Data with the action/reason of **Data Change/Acting Assignment on a Classified Position** to appoint the employee to the new position. If the employee's FLSA status changes, the effective date should be at the beginning of a payroll period for accurate payroll processing.
- To **extend an acting assignment beyond one year**, add a row in Job Data with the action/reason of Data Change/Extension of Action Assignment.

Employee Reviews

Classified Employee Reviews

The purpose of employee reviews is to assess employee performance during a specified time period.

Agencies are responsible for conducting an employee performance review for each classified employee at least annually. See K.A.R. 1-7-10

Some agencies also choose to use the Employee Review process for their unclassified employees and have the Review Types of Unclassified Annual, Unclassified Probation, Unclassified Special, and Unclassified Extend Probation.

The Ratings are described in more detail on the Performance Review form.

Review Types

Classified Probation
Classified Extend Probation
Classified Annual
Classified Special

Ratings

Unsatisfactory
Needs Improvement
Meets Expectations
Exceeds Expectations
Exceptional

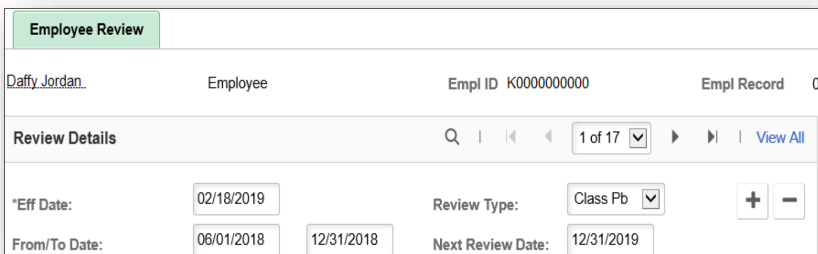
❑ Employee Reviews

❑ End Probation Review

The performance review determines whether or not an employee is taken off probationary status. A probationary period of 6-12 months defaults into the employee's job data depending on the job code. After the probationary period is complete, a new hire's probation is ended or extended based on their performance review results.

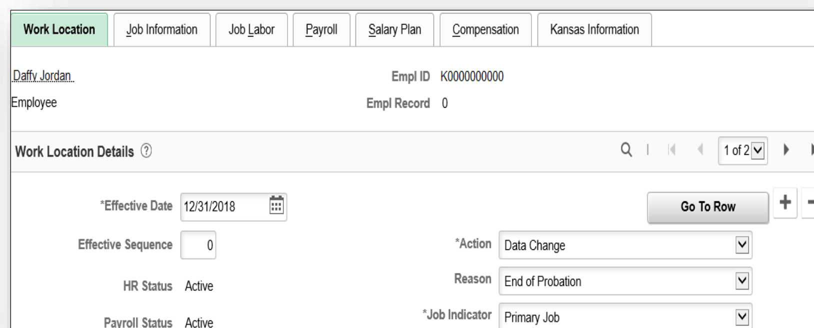
End of Probation

When you enter an end of probation review for an employee you must also **enter a corresponding Data Change/End of Probation row in the employee's Job Data**. This Job Data row changes the Employment Status from Probationary to Permanent and the Probation End Date field becomes blank.



1. Enter Employee Review

2. Enter 'End of Probation' row in Job Data



❑ Employee Reviews

❑ Extend Probation Review

Extend Probation

Prior to the end of the original 6 month probationary period, an employee's probationary period may be extended for up to 6 additional months (K.A.R. 1-7-3).

1. Enter the performance review which extends the probation on the Employee Review page.
2. Also add a row in Job Data with the action/reason of Data Change/Extend Probation and change the End Probation Date.

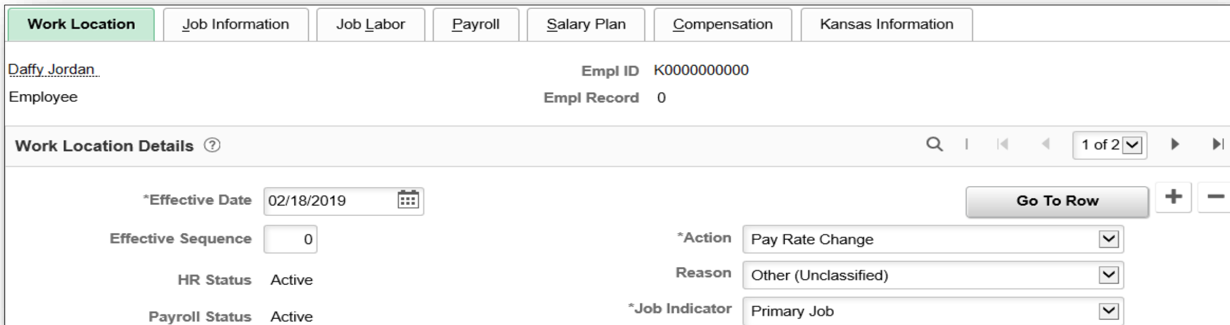
Extend Probation for Appeal

Under certain circumstances, a probationary employee may appeal a performance review. Extend the employee's probationary period for a limited period as is necessary for the appeal committee to prepare the final performance review.

1. Add a row in Job Data with the action/reason of Data Change/Extend Probation for Appeal and change the End Probation Date.

Pay Rate Changes

Unclassified Employee Pay Rate Change

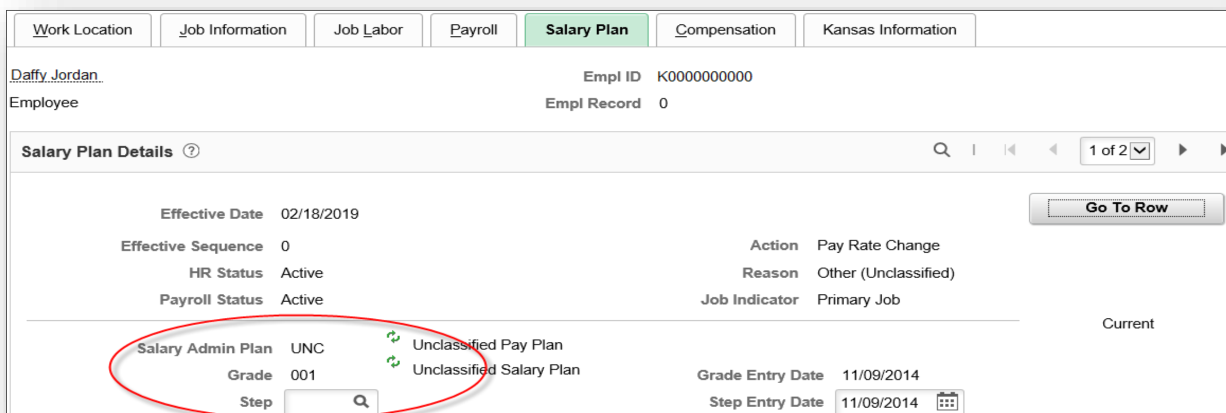


Pay changes for unclassified employees are entered in the employee's Job Data. In this example, add a row with the action/reason 'Pay Rate Change/Other (Unclassified)'.

Additional Reasons for unclassified pay changes are described later.

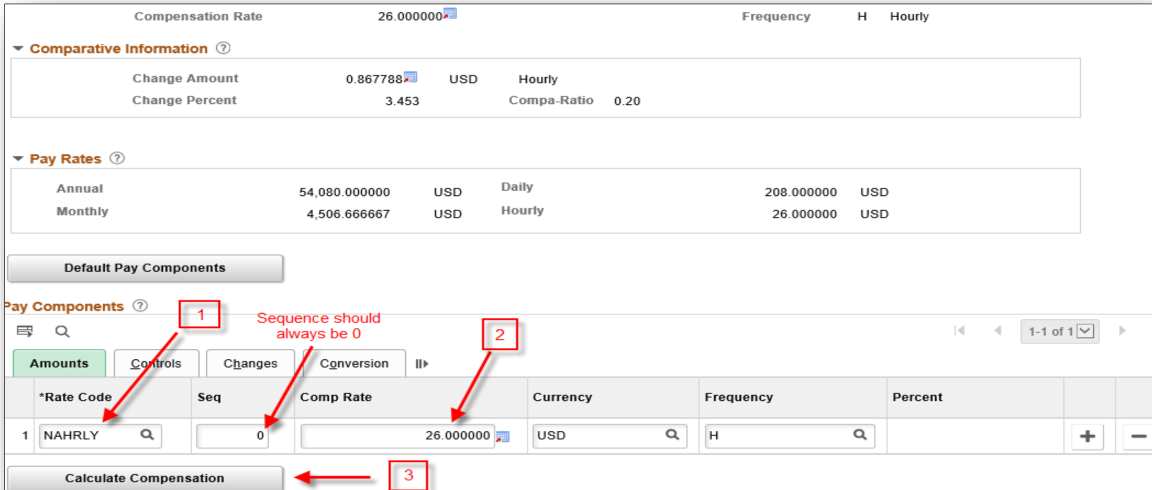
The Unclassified Salary Plan doesn't have progressive Grades and Steps like the Classified Pay Plan for classified employees.

(Salary Plans are discussed in more detail in a later lesson.)



Pay Rate Changes

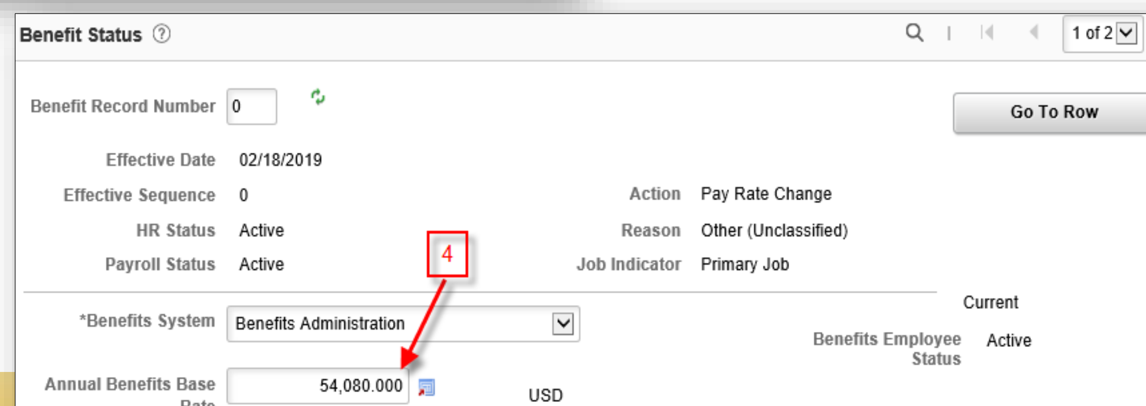
Unclassified Employee Pay Rate Change



On the **Compensation page**,

1. Enter the Rate Code “NAHRLY’.
2. Enter the hourly rate in the Comp Rate field then
3. Click the Calculate Compensation button. Other fields on the page then update, such as the Change Amount and Annual Rate.

4. Enter the new Annual Benefits Base Rate amount on the **Benefits Program Participation** page and save.



Pay Rate Changes

Reasons

Below is an excerpt from the SHARP Action/Reason Guide and describes Reasons for an Action of Pay Rate Change.

UNCLASSIFIED

- Other (Unclassified): Pay changes for unclassified employees other than for merit or promotion.
- Merit (Unclassified): Merit Pool pay changes for eligible unclassified employees whose salaries are set by the Governor based on a salary increase pool corresponding to the general increase to the classified pay plan. This reason is used only during the unclassified merit process and is usually entered by the Office of Human Resources.
- Adjustment: Change the rates of pay for a group of unclassified employees that is unrelated to the unclassified merit process. For central use only for classified employees.

CLASSIFIED

- Decrease – Disciplinary: Agency may reduce the pay of an employee one step by reason of a less than satisfactory rating. K.A.R. 1-5-20(a)(1)
- Adjustment: For central use only. Change the rates of pay for a group of employees.
- General Increase (COLA): Central use only. Used for General Increases (COLAS) authorized by legislation. Central use for CLA, WS salary plans.
- Step Movement: System generated based on time on step requirements. Step movement for classified employees in the Executive Branch is currently frozen. Otherwise, see K.A.R. 1-5-7(c)
- Higher Step (KAR1-5-8(b)(2)(A): Change the rate of pay of an employee to a higher step due to a lack of candidates for a class of positions as authorized by the Director of Personnel Services.
- Reallocation per Job Study: Central use only to insert a Job Data row when a position is reallocated due to a job study.

Pay Rate Changes

In-Grade Pay Increases

In-Grade Pay Increases (Executive Directive 04-353) offer appointing authorities the option to move classified regular employees in the Executive Branch from one step to another step on the same pay grade. Agencies must follow a request and approval process administered by the Office of Personnel Services.

The Actions/Reasons for In-Grade Pay Increases are:

- Pay Rate Change/In-Grade Pay Increase: Provide a permanent increase in pay by moving a classified regular employee from one step to another step on the same pay grade.
- Data Change/Temporary In-Grade Pay Increase: Provide a temporary increase in pay by moving a classified regular employee from one step to another step on the same pay grade.
- Data Change/Extend Temporary In-Grade Pay Increase: Extend a temporary in-grade pay increase when circumstances require the temporary increase to continue beyond the expected time.
- Data Change/Change Temporary In-Grade Pay Increase to Permanent: Change an employee’s temporary in-grade pay increase to permanent when circumstances require the increase to become permanent.
- Data Change/Return from Temporary In-Grade Pay Increase: Return an employee to the salary step the employee was on prior to a temporary in-grade pay increase.

Lesson Summary

Workforce

Administration

An employee's history of their employment with the State of Kansas is recorded in the Workforce Administration pages. Their home addresses, movement to different positions and agencies, pay changes, and other changes to their employment are maintained here.

Actions
&
Reasons

The Actions and Reasons selected for entries in employee Job Data describe the employee's work history. They may trigger specific defaults and are very important to the accuracy of employee Job Data. The SHARP Action Reason Guide is an important reference describing how and when to use the actions and reasons.